

# Briefing

November 2019

SMARTER LEGAL BUSINESS MANAGEMENT

SUPPLEMENT INSIDE  
AUTO ADVANCES

STORY SPARK  
Pinsent Masons details a  
change for decision making

TECHING IN  
How the technology and  
innovation team works at TLT



## *Slice time*

*Michael Castle, UK managing partner, Deloitte Legal, on the strategic plan to offer your clients a potentially tasty alternative*



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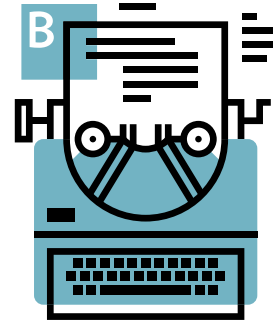
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# Editor's letter



O

ver half of respondents to the annual law firm survey from Smith & Williamson out last month cited "talent retention" as one of their top three concerns. Now, the 'war for talent' is a trend talked about since I first started covering this industry back in 2006. But as competition continues to get a good shakeup (do check out our interview with Deloitte Legal – p12 – by the way) the confidence that firms can convincingly win it has apparently taken a tumble. High-profile moves – including in strategic operational roles – are much more common. And S&W makes the point that: "Outside of traditional law firms, new entrants to the UK market pose a challenge by offering greater flexibility in work patterns."

Granted, some firms might take issue with that last point. But I'd suggest that if the business case for working much

harder at improving, supporting and defending their workforce diversity wasn't already apparent to firms, a growing talent-retention challenge might not be a bad place to begin a new thought process.

It was interesting to see that DWF recently gave itself some tougher diversity targets in line with the Hampton-Alexander Review – 33%

female representation on the executive board, and women in 30% of other senior leadership positions (partner, director and 'head of'), by 2022. Plus, it targets itself with 10% BAME representation across those positions, inclusive of the board membership. The head of its diversity and inclusion leadership group succinctly said: "Becoming diverse rarely happens by accident. Real diversity and inclusion require change and commitment. We are serious about recruiting and retaining a diverse workforce."

And as announced at our recent **Briefing** TEI 2019 event, I couldn't be more pleased to officially confirm this publication's partnership with the 'She Breaks the Law' movement, launched earlier this year, to support female leaders in connecting, collaborating, and creating change across the full spectrum of roles in our readership.

**RICHARD BRENT** EDITOR-IN-CHIEF



Only a select few  
understand the  
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# Inside this month



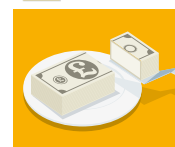
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## Future finders

*"The idea is to enable us to experiment with an increasing number of new things more rapidly."*

Ian Lauwerys, IT and facilities director, TLT

## Briefing



Slice time

**Briefing** is the only legal business management title, and is focused exclusively on improving the work and worlds of law firm management leaders. Every issue is packed with relevant insight and lessons from peers and pros.

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## 65 SECONDS WITH ... RUTH WARD



Ruth Ward, director of knowledge at the Government Legal Department (GLD), and former head of knowledge at Allen & Overy, offers her perspectives from a new public sector role

### **Q** What was your route from private practice to this new public sector role with the GLD?

**A** I was approached about the role at the end of 2018, and it had an instant appeal for me because it's a new and worthwhile strategic role. It looked like an opportunity to apply everything I've learned and all the skills I've developed, both as a lawyer and as a knowledge professional, in a new setting. I moved over in June 2019 and didn't take a gap. A lot of friends and colleagues thought that I was mad, but I'd actually recommend it – I hit the ground running at the same pace as I was accustomed to at Allen & Overy. My initial focus is developing a new knowledge strategy and then implementing that up to the end of the next GLD strategy period in 2024. It's part of our drive to reap the benefits of integration at departmental level, now that we have grown to a department of nearly 2000 lawyers.

### **Q** What changes in knowledge management in recent years have been the most significant to you?

**A** For most of my career in KM the problem has been not having enough technology, or not the right technology. Now, however, people almost have the opposite problem – there's a new product

everywhere you look, so how do you make sure you're choosing the right product set for the next one-to-five years? There's also been an increasing focus by clients on how the way we work impacts the price they pay, and we've subsequently seen a more granular focus on job titles in technology and knowledge roles, and joint roles too. At Allen & Overy, for instance, we made the formal alignment between our legal knowledge and innovation and technology functions some years ago.

### **Q** Do you have any advice for new knowledge management professionals?

**A** A recurring theme from the last 20 years that I've worked in this area is that many KM professionals and PSLs spend more time doing their work than shouting about the value of what they are doing and the 'value-add' skills they bring. So, there is a risk that management won't recognise the value or the skillset they have. As one example, the knowledge community within firms often has relevant skills in data and process automation, but they're not always highlighted as much as they could be. In some places, knowledge professionals are already working on AI and automation initiatives, but it's still not happening across the board, so I'd encourage people to be curious and proactive about reaching out to their knowledge community when they are focusing on innovation.

### **Q** What areas should knowledge keep an eye on?

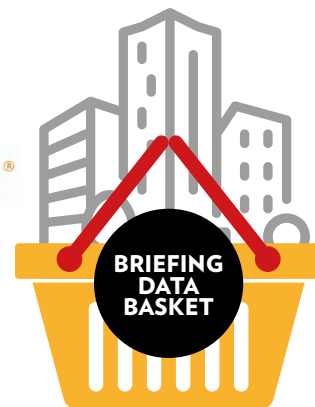
**A** Data, data and more data. Most law firms and legal departments, both on their own account and also in collaboration with clients, are only just beginning to scratch the surface of how data might have an impact on processes in the future. Very significant is being able to define upfront, as part of an initial instruction, the key data points that you will ultimately want to monitor once the documentation is done and the deal is signed and ready for you at the end. Data-driven insight will become more important too; the ability of law firms and legal departments to marshal data that tells them how much work costs, and where there are recurring issues, will be powerful driving forces in future innovation and improvement.

### **Q** What have your GLD highlights been so far?

**A** I'm currently assembling our team to support the new knowledge strategy, which I always enjoy. I've also been pleasantly surprised by the number of senior female leaders here, but the biggest surprise has been how deeply fascinating the work that all our lawyers do is. I'm now on a one-woman recruitment mission for GLD because if you are interested in law there's really no better place to work than this department, as far as I'm concerned. ▴

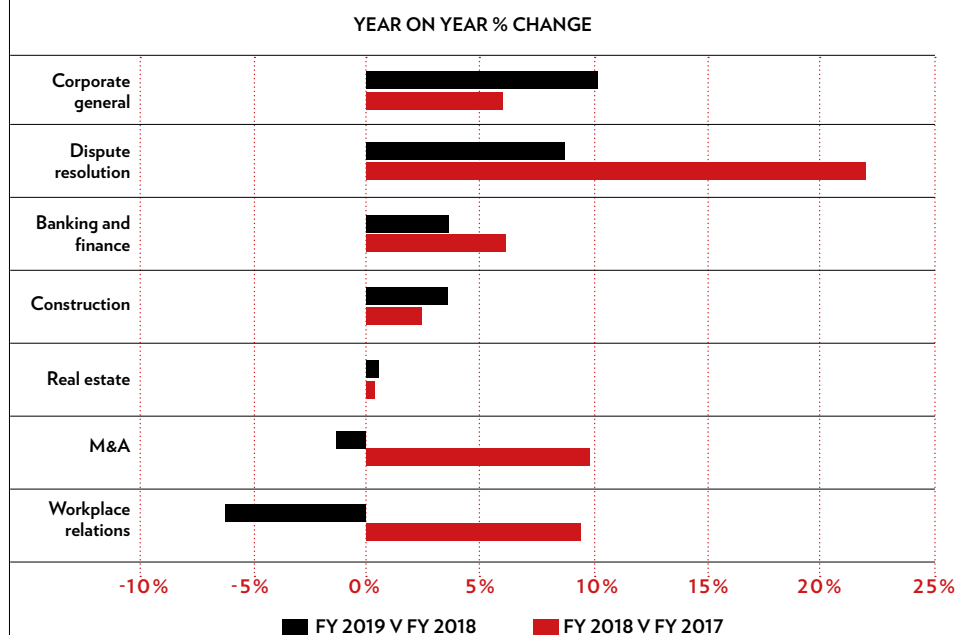
# Database

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This month we turn our attention to work in Australia. How is overall demand looking for legal services, and what have firms been spending on the effectiveness of their delivery?

## THE STATE OF THE LEGAL MARKET - AUSTRALIA (FY 2018-19)



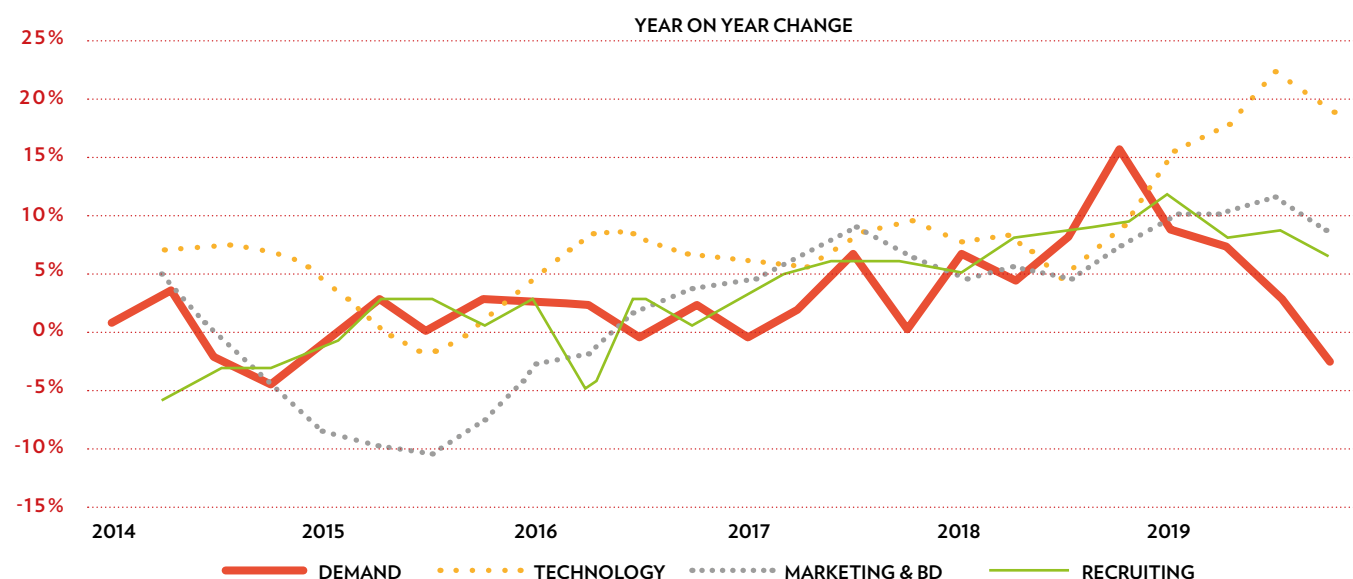
## PEER MONITOR® PERSPECTIVE

Although the last quarter of FY19 saw the first period of demand contraction since 2016, last year both demand and revenue rose to new heights for Australian law firms overall. Firms continued to hire more lawyers, and worked rates grew at a pace not seen for some time.

Familiar challenges remained, however. Clients continue to demand more for less, alternative legal service providers (ALSPs) continue to emerge, and reliance on in-house legal departments continues to grow. Perhaps more worryingly, there was a significant drop in productivity, with the average lawyer's billing down 37 hours on just a year ago.

Taken together, the future of the Australian legal market is uncertain. While it continues to outperform the majority of global legal markets in terms of growth, fears about reaching the ceiling persist.

## WHERE ARE THEY SPENDING? AREAS OF EXPENDITURE COMPARED TO DEMAND



Source: This information has been taken from the 2019 State of the legal market: Australia report by Thomson Reuters and Acritas, and uses data from Peer Monitor. To read the full report, visit <http://ask.legalsolutions.thomsonreuters.info/2019-Australia-State-of-the-Legal-Market>.



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## SPEAK UP

# Digitalise wide open

**T**he legal sector, which has traditionally lagged behind others when it comes to digital innovation, is ripe for transformation. However, there's a fine line between being the disruptor and becoming the disrupted, and firms that don't proactively embrace change risk being left behind.

While legal businesses may have some ideas, or even an initial strategy, around where to begin with digital transformation, there can still be a lack of internal awareness and confidence about how to begin with the practicalities. It's not only on a technical level that we might see this, but also where people and process changes need to be made to leverage digital tools properly.

A common obstacle to innovation in the legal sector is an internal reluctance to proactively embrace change. Indeed, a Law Society survey from 2017 found that, while three quarters of firms agreed that innovation is critical to exploiting opportunities and standing out from the crowd, more than half also said they were likely to wait for others to pioneer new technologies.

It's that reluctance that led me to take up the role of director of digital and disruption at Fletchers Solicitors. The business knew that there were

opportunities to exploit, but it needed to be innovative to take full advantage of them and meet current market challenges.

One such challenge is the rise of external companies in the legal technology space – particularly around automation and digital customer experiences. The big four consultancies – Deloitte in particular – are already making moves in the legal sector, and it's conceivable that the likes of Amazon and Google could join them in the future.

Customer expectations are also changing – people have become increasingly used to immediate responses to queries, rather than waiting days or months. As technologies like advanced automation, machine learning and artificial intelligence are beginning to mature in the legal sector, we wanted to become the disruptors that bring those technologies into the legal space.

Done right, the digitalisation of the legal sector can potentially be a transformative force for good, maximising access to the justice system for those that need it most. Using technology we hope to leverage this potential, driving business improvements, opening up new opportunities, and leading to an improved customer experience for all. ▴



**James Alexander**  
Director of digital and disruption  
Fletchers Solicitors

**There's a fine line between being the disruptor and becoming the disrupted, and firms that don't proactively embrace change risk being left behind**

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Louise Hadland  
HR director  
Shoosmiths

To understand why we keep doubting the younger generation, we first need to appreciate the scope of the problem

## SPEAK UP

# Training on trial

In 2013 the SRA undertook the legal education and training review (LETR), concluding that the black-letter law elements of the legal practice course (LPC) should be shaved back to allow for a greater “focus on commercial awareness, and better preparation for alternative practice contexts”. The authors recommended more “blending” of formal education and training contract experience.

This is all grist to the mill for intergenerational naysayers. Training is not what it used to be. Standards are slipping. I needn't go on ...

Paul Philip (SRA CEO) had reassuring words about the recent Solicitors Qualifying Examination (SQE) stage one pilot – the exam which will replace the LPC. He said it “brings us a step closer to delivering a world-class assessment. It provides confidence that the core part of SQE1 is appropriately rigorous, while helping us to improve it further.” However, a review of the pilot also found the assessment design didn't work (although the SRA has stated that they will be amending this element) – adding more fuel to the ‘eroded standard’ bonfire, ably stoked by dyspeptic elders who don't want to see a change.

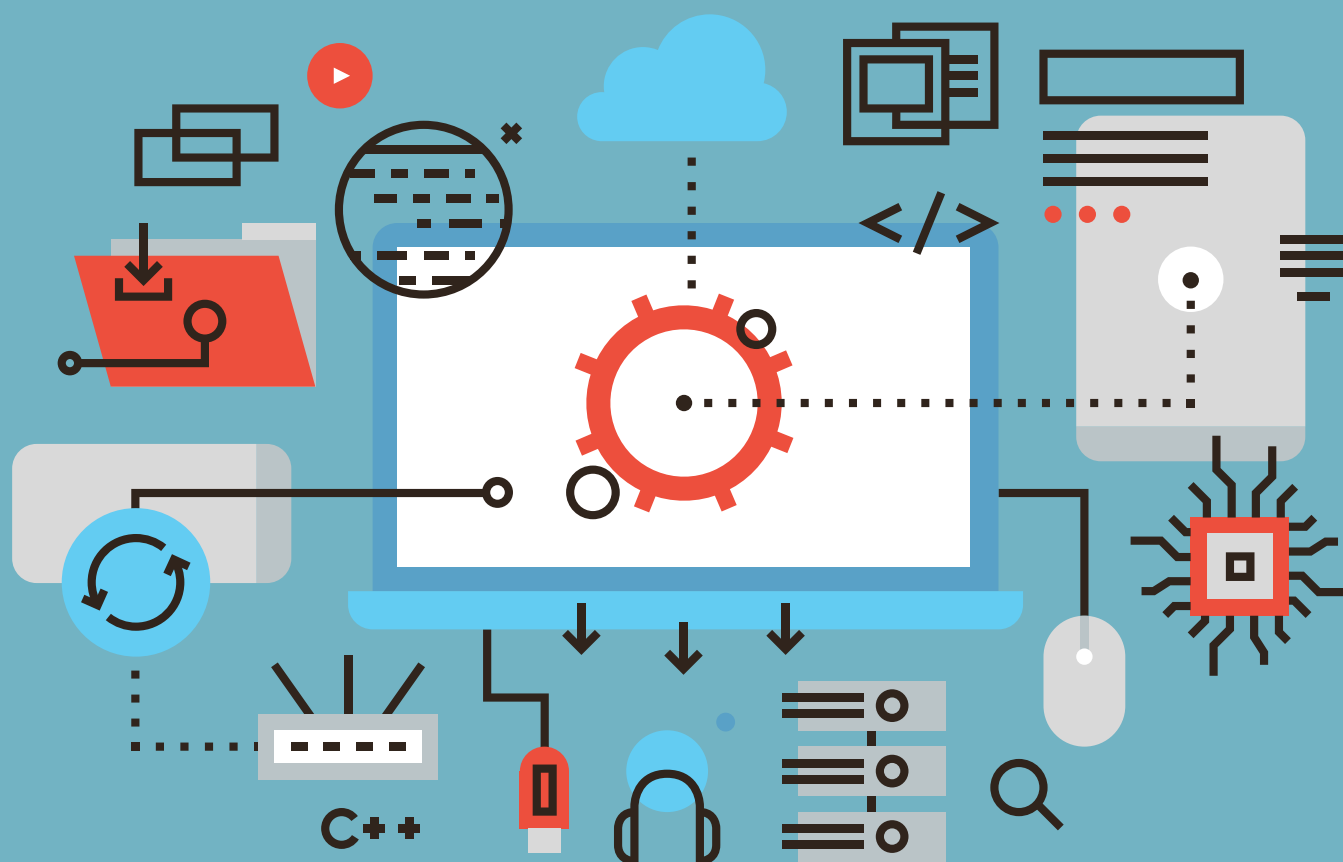
And here we get to the nub of the problem. Ira S Wolfe, author of *Recruiting in the Age of Googlization*, has commented on how a decade ago millennials were seen as “this horrible, spoiled, rotten, narcissistic, egotistical, lazy generation”. So, the naysayers will say, not only do we have a generation who will not, or cannot, apply themselves, the training is no longer as rigorous. It's a recipe for disaster. Or is it?

To understand why we keep doubting the younger generation, we first need to appreciate the full scope of the problem.

As Jason Feifer, editor-in-chief of *Entrepreneur* magazine, observed in a column last year, our earliest texts are littered with youth bashing. From 600 BC to 300 BC, the texts of the ancient Greeks complain of children becoming tyrants, contradicting their parents, and wolfing down the best treats at the table. The comedies of Plautus, who died in 184 BC, often feature a disappointing son with a taste for prostitutes. In more recent times, Adam Thierer, senior research fellow at George Mason University, has noted that, once their adventure window slams shut (once they have children), many parents, policymakers, or social pundits convince themselves that “the good old days” are behind us and the current good-for-nothing generation and their newfangled gadgets and culture are steering us straight into the moral abyss. “There has probably never been a generation since the Paleolithic that did not deplore the fecklessness of the next and worship a golden memory of the past,” notes Matt Ridley, author of *The Rational Optimist*.

But wait ... back to Feifer. “Everything we know – everything we have ever relied upon, or been impressed by, or adored, or treasured, or desired – was created by a generation who had been dismissed by the one before it. If we worsened over generations, rather than improved, we'd have nothing. We'd be banging our heads against the ruins of the pyramids. Instead, we built the modern world.”

Our lives today are incontrovertible evidence that new generations – complete with their new training and laissez-faire attitudes – will build a successful future. They will use that new training to carve out their own rosy futures. And they will no doubt come to criticise the generations that follow theirs. ▀



# Features

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### *Know the combination*

**Deloitte Legal UK**  
managing partner Michael  
Castle talks to Richard Brent  
about what's still missing  
from the legal market

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### *Faster future forward*

The technology and  
innovation team at **TLT**  
tells Richard Brent the  
meaning of the firm's  
**Future Law** initiative

# Know the combination

Michael Castle, UK managing partner for Deloitte Legal, sets out the key pieces of his inaugural strategy, and tells Richard Brent why this business really can afford to do things differently

When **Briefing** asked law firm leaders: “Which kinds of businesses are most threatening to your firm’s future?” – just one small part of our annual Legal IT landscapes research back in October/November 2018 (check it out at [www.briefing.co.uk/reports/legal-it-landscapes-2019](http://www.briefing.co.uk/reports/legal-it-landscapes-2019)) – 16% picked out the Big Four. This was the same proportion as had ticked the box for “legal tech-based ‘new’ businesses”, ahead of companies combining “technology and contract lawyering”(14%), or indeed firms’ own clients (10%), as presenting a competitive risk to a chunk of revenue.

It would have been interesting to know the results of this year’s survey before writing this

piece – but we’ll all have to wait a month or so for that. Of course, in 2018 the Big Four’s intentions had already made for one of the top legal business stories by this point – EY’s acquisition of ‘tech-driven’ Riverview Law. Now, in 2019, it has been Deloitte Legal making headlines, not least for an eye-catching string of senior operational hires from leading law firms. Bruce Braude arrived from Bryan Cave Leighton Paisner (BCLP) as the first chief technology officer. Laura Bygrave joined at the same time, from Taylor Wessing, as new innovation lead. Chris Bull (formerly of Osborne Clarke and Integreon) is onboard in a fixed-term role to design a “dynamic legal operations infrastructure”, and most recently consultant Catherine Bamford (previously with Pinsent



Masons) has shown up to lead on legal engineering.

At the global level there was a non-exclusive alliance struck with US-based employment firm Epstein Becker & Green (EBG) – and, right at the top of the year, managing partner Michael Castle moved from Allen & Overy to become Deloitte Legal’s first permanent lead partner.

### **Strategy of synergies**

Sounds like a plan? Indeed it is. Although Deloitte was the last of the Big Four to pick up its alternative business structure licence as recently as 2018, Castle has just confirmed details of its strategy to deliver something for clients that, he argues, traditional law firm partnerships still

simply cannot. In brief, that’s to effectively combine what those law firms do with work that all the key new forms of competition claim they can do that significant bit better – project managed, well packaged and neatly productised wherever possible.

“Obviously, law firms are very, very good at giving legal advice, but in truth it does tend to be very event-driven advice,” says Castle. And equally obviously, he’s working hard on recruiting plenty more lawyers to join the around 60 in place in the UK at present (although there are some 2,500 of them operating globally – again, the UK is new to the game). “Then you have the alternative legal service providers, which rightly argue that not everything needs to be done by a very expensive

**“Our lawyers will be able to use tech to focus more on the more interesting parts of the work, at the same time as bringing the price point down.”**

*Michael Castle, UK managing partner, Deloitte Legal*



lawyer – but critically, those businesses aren’t regulated legal service providers.

“Third is technology and data-driven products – the world of legaltech is light years behind that of fintech, and everybody knows that, as tech is advancing, the way lawyers work is likely to be very ripe for some transformation. And fourth is the growing group that we’ll call legal management consulting. The Deloitte Legal strategy is to bring all four of those capabilities together – teaming lawyers with consultants, with tech, and with scale delivery – into a single unified offering.”

Clients are crying out for this, Castle says. “They’ve wanted it for a very, very long time. Everybody is still obliged to find ways of meeting the more-for-less challenge, and they can also see the sizeable transformations taking place for access to services in areas such as HR, IT or finance. There just aren’t the equivalents coming through in the legal space.” Even many of the lawyers themselves want to see bolder change, he suggests – something that takes more pieces of ‘process’ away from their part in overall delivery, perhaps, so they can focus more on the “legal problems”, as such.

“The other big point to make about our strategy is that we will be building this legal capability in areas that are synergistic with existing areas of Deloitte expertise.” For example, Castle says, Deloitte has already been advising on matters of payment protection insurance remediation through a managed services platform. “You can see how we could introduce lawyers there to advise on issues like LIBOR remediation or contract lifecycle management.”

Perhaps the best example is employment services – the field where Deloitte has also entered into alliances with US law firms EBG and Berry Appleman & Leiden (BAL). “We have a market-leading business that advises on every aspect of employing people that you could ever wish to be advised on – mobility, incentivisation, share schemes, redundancy programmes – but until very recently we hadn’t done the employment law.

“There’s very little out there now where legal advice is the only advice a business needs – and when you do need it, you need it as a solution. Maybe it includes some tech, or perhaps building a new process, or some consulting work. One client was recently talking about implementing a new IT



system right across the business, where the GC had quite understandably asked a law firm for some advice from a data-privacy perspective. The firm produced a beautifully written document highlighting some concerns, but what needed to happen next with it?" The client was confounded. By contrast, Deloitte "teamed up privacy lawyer with IT consultant, and the problem was solved", he says.

In each of these examples, of course, some form or combination of technology may also have enhanced the service's delivery. And while leading the investigation of new opportunities and business cases to bring in tech products, Bruce Braude will also oversee continued roll-out of proprietary solutions (such as contract management tool dTrax), develop new products for sale, and collaborate with the legal consulting group.

Castle says there are two key things that mean you should consider backing Deloitte in any tech race. "The first is the scale of our investment ability." The business's overall global revenue is well over 10 times that of the very largest law firms that grace these pages. "Second is that depth of wider technology expertise. Growth isn't just about innovation within legal services. We can put lawyers together with not only legal technologists, but also robotics or AI experts who work across sectors, to collaborate on new solutions." That could be ideas such as core advice by chatbot, for example – employment, once again, being a case in point. "One project we're exploring developing is a subscription service. A lot of the law doesn't change vastly, and you can easily place some of that information into a chatbot, providing escalation points back to an employment lawyer as and when needed."

### Change of careers

At the more junior end of resourcing, in September 2019 Castle announced that from 2020 the firm would also run a training programme for its lawyers based on the new Solicitors Qualifying Examination (SQE). Designed with the University of Law, it enables university leavers to qualify as

solicitors after three years. A Level 7 solicitor apprenticeship programme for school leavers was launched at the same time.

"One of my first priorities on arriving was to see that we're hiring the best graduate talent," says Castle. "That coincided with the arrival of the SQE, and we were in the fairly fortunate position to have a blank canvas for training."

"Another advantage seems to be that the SQE regime is more akin to how accountants are already trained – learning the job, on the job. You can earn as you learn as well, which also makes a big difference in terms of widening access to the profession."

"To say that you have to go to law school, or even do a degree, inevitably decreases the pool of people who may apply. So again, we were able to take learning we had embedded already, and map it to the legal profession."

All of these trainees will also be thoroughly trained in use of the firm's existing tech set, he adds – and importantly, to grow a mindset that challenges reaching for precedent as the automatic choice. "Lawyers need to ask themselves questions like 'Is there a tech-based solution to this problem?' Moreover, one seat we're offering is in the forensic technology team – specialising in data extraction, from e-discovery to contract remediation and due diligence. I don't believe that more tech means we won't need as many lawyers – rather it's that our lawyers will be able to use tech to focus more on the more interesting parts of the work, at the same time as bringing the price point down."

Suffice it to say, Castle is focused firmly on introducing lawyers to the equation, not removing them. However, he believes that the window to see how all of these legal business trends would play out has given this business something of a 'last mover' advantage. "It's that much clearer what a growth strategy needs to be, based on what clients really want. And in truth, I think the opportunities for us to collaborate with the law firms as they grapple with all their challenges are perhaps even greater than the opportunity we have to compete with them." ▀

## TEAM PROFILE

# Faster future forward

The innovation and technology team at TLT talks to Richard Brent about how the firm's Future Law initiative unfolded, and why some things can be stronger divided

**A**s a leading law firm that will only officially be turning 20 in 2020, TLT could perhaps be seen as a firm straddling the worlds of traditional and 'New Law' that are often depicted as facing off. You'd expect it to at least be highly alert to the shifting landscape that might affect its competitiveness in that context – but **Briefing** was still rather pleased to hear about the Future Law initiative when it launched just over a year ago in October 2018. Why so? In our flagship annual Legal IT landscapes research that year, 45% of respondents said they now had a dedicated innovation or R&D budget. Future Law, which is designed to drive change more rapidly in the way the firm delivers legal services and products to clients, involves one such fund, with £500,000 ringfenced for largely client-focused legal experimentation and co-creation.

James Touzel, partner, head of the firm's digital team and overall lead for the new arrival, says: "My role involves overall accountability for Future Law, leading on the work of ultimately deciding what to prioritise for development – and over what time period – to make the business case for the specific resource that's available." However, he adds, clients are also front and centre in building this relatively new pillar of firm strategy.

He continues: "Some of our clients have huge in-house legal teams, others just one or two lawyers, but they're usually grappling with many of the same challenges around efficient and effective delivery. And they're challenging their providers to reinvent aspects of how they work to the same end."

As a 'young' firm, Future Law is a recognition of the fact that TLT needs to take that mission to a more strategic level, says Touzel. "We've spent –

and continue to spend – a lot of time with our clients talking about their real needs, rather than building products we hope they'll want."

Calculating the specific sum set aside is "more art than science", he admits. "But a lot of innovation work isn't typically a very high capital cost. There are the resources and practicalities of partnering with some technology companies, for example."

Strategically very valuable, however, is ensuring the budget is indeed protected from competing business priorities. IT and facilities director Ian Lauwerys explains: "It has proved particularly helpful to have the fund there as a marker, so we can be that much more focused on prioritising and progressing the work, and avoid redirecting resources into what might appear more urgent, such as fixing or replacing things.

"The idea is to enable us to experiment with an increasing number of new things more rapidly – seeing whether they work, and deciding whether that can be turned into something else – rather than that becoming a big bureaucratic exercise."

But Lauwerys does also sit on the 'projects and transformation steering group', which decides just how much money should be allocated to the work

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**"We've spent – and continue to spend – a lot of time with our clients talking about their real needs, rather than building products we hope they'll want."**

*James Touzel, partner and head of digital team and Future Law*



of various different initiatives, including Future Law. And in a broad remit, he also leads the project management office, which deploys project managers and business analysts to different work streams firm-wide.

### Client journeys

Our third team member this month is Siân Ashton – who has the title of client service transformation partner, and is involved in the Future Law journey from the perspective of clients.

She underlines: “Not every idea will work, so we need to challenge ourselves to invest the time and money in products or ideas that do work, are useful, sensible and efficient, and meet an actual client need.” In short, there’s also a process of elimination involved in innovation.

Ashton’s focus on the streamlining of legal work began several years earlier, as she was involved in the setting up of TLT’s then-new document-review team (part of the TLT ReSource captive shared services centre). And she stresses that Future Law should absolutely not be seen as just a tech fund. “We’re starting from the point of a specific client problem, rather than innovating for innovation’s sake, and technology is only one

stream that may flow into that.” It could equally involve key elements of process redesign, different or extra documentation, or fresh skills such as those Lauwerys’s unit oversees, she says.

She’ll also often be involved in the firm’s client innovation workshops, which aim to avoid the problem of ‘rush to solution’ without first fully appreciating the various nuances of the real business problem. “Sometimes, even if a great idea is built, it doesn’t get off the ground – because you haven’t done the legwork of breaking down the issues properly,” she explains. So processes contributing to specific commercial arrangements can, for example, be mapped across a ‘wall’ to identify pain points before sense-testing potential remedies. And sometimes that may lead to a product, like “an award-winning franchising solution developed with and for a major UK fashion retailer”, she says.

Touzel points out initial ideas can flow into Future Law from several directions, however – workshops involving large teams from a single client, several clients with a common need or challenge, or observations and engagement internally that identify options for doing things differently. “It’s a work-in-progress to keep

FROM LEFT TO RIGHT: Ian Lauwerys, IT and facilities director; Siân Ashton, client service transformation partner; James Touzel, partner and head of digital team and Future Law, TLT

PHOTO CREDIT: CHRIS CRONIN

## ▲ FIRM FACTS

### TLT

Offices: 7

Revenue: £87.6m

Headcount: 1000+

Ratio, total fee earners to business services employees: 2:1

improving those levels of engagement, ensuring great ideas are captured, and correctly identifying the ones to prioritise.” He can see merit in the recent move of apportioning some ‘innovation hours’ – although TLT doesn’t have such a policy as yet – and Lauwerys is trialling some internal collaboration tools that may facilitate proactive idea exchange and subsequent shaping (ideally getting rid of some email overload in the process).

“A quite significant change is having some groups of people at the firm who are that much more exposed to clients’ realities than they were in the past,” he adds – meaning even more potentially valuable perspectives to harness. Another of his current projects is also collaborating with lawyers as well as the business development team on bespoke client digital strategies – again avoiding the industry’s default position of “here’s some technology that everyone uses – so let’s buy that ...”.

### Product partnership

Almost inevitably, given that last line, tech does continue to generate headlines. In TLT’s case, for example, there’s its multi-year partnership, plus minority stake, with machine-learning contract management tool LegalSifter. Preceding Future Law by around a year, this arrangement was “something of a catalyst” for the new ways of working around product development, explains Touzel. “And TLT’s technology partners really like the firm’s approach.

“There was first improving how we identified changing client needs around contract review – and then market-engagement exercises to identify technology providers that could potentially address those challenges. Now we’re LegalSifter’s partner for development and going to market with a new, even more valuable, version of the product for clients in the UK.”

Partnering with the right technology providers to deliver real value that solves a specific client need is something that TLT has really focused on, he adds. “We’re not a technology developer. Our clients don’t go to their law firm for a quote for software development, just as you wouldn’t buy legal advice from a tech company.” And although a little computing nous and evangelism is important within law firms to see off technophobia, he says

he can’t see coding coming up on lawyer colleagues’ job descriptions any time soon. “The law firms saying they’re getting all lawyers to do coding – it looks like a bit of fun, but I’m not sure it offers that much benefit to clients.”

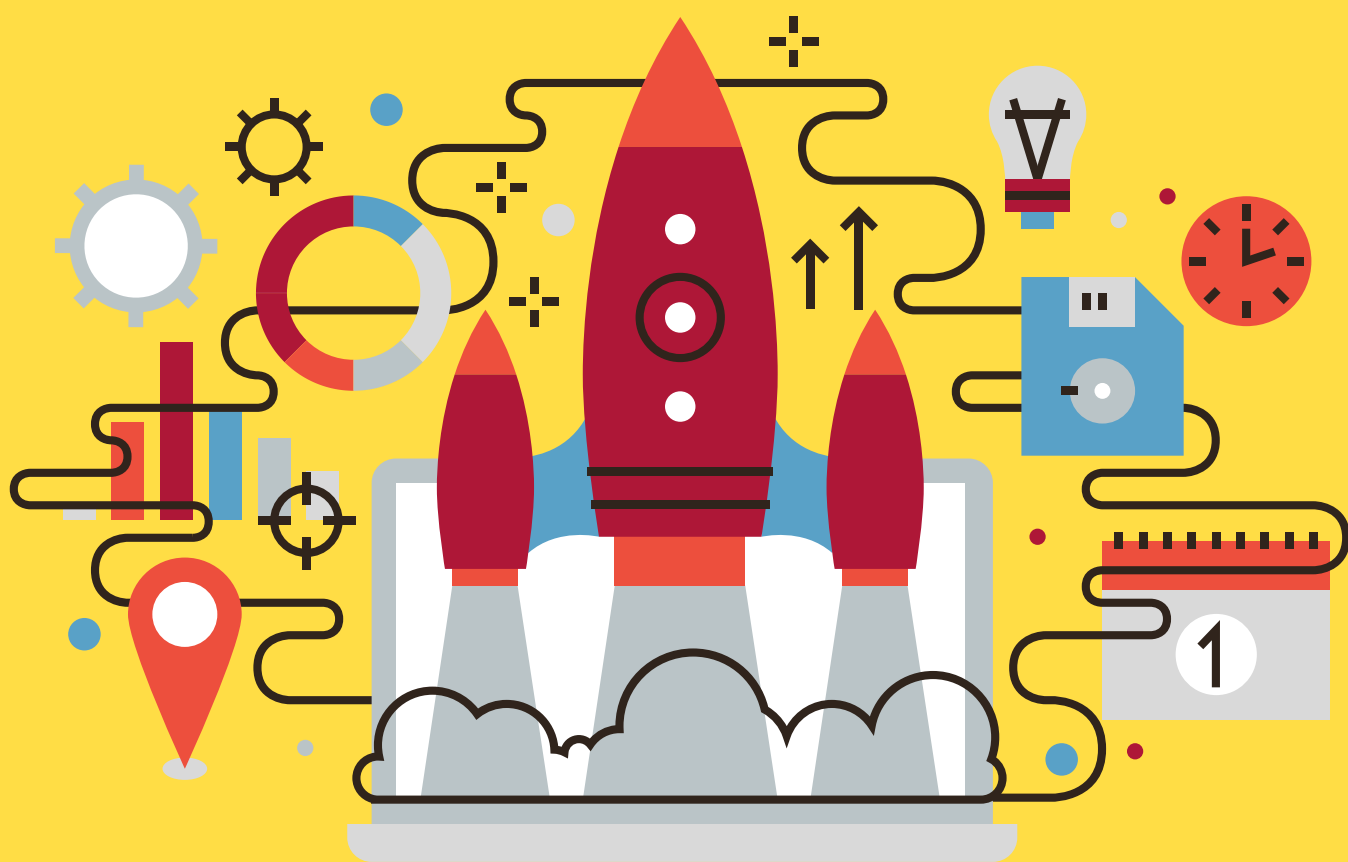
Ashton adds: “There are always lawyers with a special interest in getting into the more technical areas of IT. They can often usefully be the ones driving some of the application and innovation from that side. But I don’t believe we’re anywhere near a place where everyone needs some programming ability,” she agrees.

The business of contract automation, on the other hand, is right up there: “We can help clients with contract creation, review, negotiation, signature and management, as well as data extraction and analysis,” says Touzel. “They find this combination of expertise really valuable, and we can offer it as a whole solution or just the elements they need.”

And what about work out in the wilds of business-as-usual? Lauwerys joined the firm with a very different remit – getting the firm “fighting fit” for where it needed to be from a platform perspective within five years. There’s already a new document and template management system on the way (where client input has again been key), some transformation of time-recording, the aforementioned collaboration options, managing costs, business continuity, and continuing the journey into the cloud. “We’re planning to move our main email platforms to the cloud shortly before 2020,” he says.

“A separate budget for innovation and client focus is a very good thing, as it would be very, very easy to spend all your money simply on ‘keeping the lights on’ – and some IT directors might very, very easily be persuaded to do just that,” he laughs.

And although admittedly lights and the like need some focus too, the big lesson of Future Law from Touzel is to be “bold” in trying something a bit different. “You need the confidence, as well as ambition, to be more experimental. If it doesn’t quite go as planned, that’s a learning for you, and so you do something differently again next time. Absolutely key is learning the lesson, but everything doesn’t need to be 100% perfect before you’ll consider having a conversation with a client.” ▲



# Brain training

## 20

### *Spark life*

Jonathan Bond, HR director at **Pinsent Masons**, explains why it was time for a new body to join the board

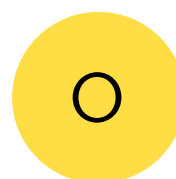




▶ HANDS ON

# Spark life

Jonathan Bond, HR director at Pinsent Masons, explains why and how a brand-new body has been introduced to assist the firm's global board



One of our core values at Pinsent Masons is 'approachable', and this was put to the test earlier this year when Philippa Ward, a solicitor in our corporate team, approached the senior partner, challenging him on the age diversity of the board and asking why we did not have some type of junior or shadow board. I am delighted to say that Richard passed the test and invited Philippa to speak to me and others to develop a proposal.

Working with our director of knowledge and innovation, David Halliwell, Philippa developed a proposal for a 'Spark Board', which she put to the board, receiving its warm support. It is called the Spark Board because, in the business, we often talk about finding the spark – that moment of

inspiration, ingenuity and inventiveness.

The new body will bring a fresh perspective to our strategic decision-making. It has been tasked by our global board with considering and presenting its views and proposed solutions to a number of advisory projects, as directed by the board. In addition, it has been tasked with selecting a number of 'big-picture thinking' projects of its own choosing, and making recommendations around those to the board.

The aim is to support an inclusive approach to strategic decision-making, ensuring the firm's main board benefits from perspectives from outside as well as within the partnership – and the composition of the Spark Board will ensure that viewpoints from different generations, geographies and job roles are represented when the board considers different propositions.

It consists of eight people, all of whom are below the level of partner, legal director or director of business operations. The firm invited applications from across the global business for positions over the summer, receiving 130 applications from the whole network of offices. A shortlist of candidates was selected for interview, and eight people have now been appointed for a two-year term (see photo). They are:

- Alexandra Aikman, associate, Dubai
- David Bryden, solicitor, Edinburgh
- Julian Grant, associate, Melbourne



- Andrew Kane, SmartDelivery manager, Birmingham
- Sania Khan, responsible business executive, Leeds
- Valentine Morand, avocate à la cour, Paris
- Hinesh Shah, forensic accountant, London
- Philippa Ward, solicitor, London

#### Matter of perspectives

In terms of Philippa's point about age diversity, the reality is the members of the firm's two primary leadership committees, the board and OpsCom, are 20 to 30 years older than the most common age group of the people

in our firm. This initiative was born from a recognition that, whether you're a lawyer, a fee earner in another discipline, or a specialist in an area of business operations, you can offer a different way of thinking, and alternative expertise, on the big issues. There is a recognition around our business that no single person or committee has the monopoly on good ideas, and that's where the Spark Board has an important role to play. We can better use, and benefit from, the diversity of all our people.

In considering the proposal, the board also recognised that, as we continue to transition our business, we know our decision-making needs to be informed by the widest possible range of talents within our business. If we want our business to work better, we have to be prepared to push a few boundaries, and that includes around key decision-making.

In terms of the relationship between the two boards, the global board will continue to be

**Whether you're a lawyer, a fee earner in another discipline, or a specialist in an area of business operations, you can offer a different way of thinking, and alternative expertise, on the big issues**

elected by partners and to develop strategy. The difference is that now it can call upon, and be supported by, the Spark Board for input on its decisions. Board members will regularly attend the new group's meetings and vice versa, so communications between the two boards will be frequent. The board will ask the Spark Board to present an opinion on certain matters it's considering, these being the 'advisory projects'. However, the latter will also have the ability to review the matters on the board's agenda and request to share their thoughts on a particular matter on which they feel they can add value. Furthermore, the Spark Board will also review the 'big picture' items produced by the board and our operations committee (together with their own suggested topics), and they will select four on which to spend six months considering and researching, before presenting solutions – these being the 'thinking projects'.

We believe that having this new structure will lead to a more inclusive decision-making process, which is more inclusive of the many talents around our business. We also hope it will be a catalyst for engagement around the firm and increase the connection between senior management and junior colleagues. Furthermore, the Spark Board should stimulate, inspire, encourage and nurture potential future leaders by providing opportunities to gain insight and experience as to how a board works. It encourages collaboration, cohesion and

**It's important to stress that this is not the same as a mirror, shadow or junior board. The Spark Board follows no previous template and has been designed to suit Pinsent Masons**

greater team working between generations and across all of Pinsent Masons, building valuable networks.

The new board's roles will all be held for a maximum two-year term. We think this is a length of time long enough for the Spark Board members to:

- Bond well as a team
- Extract the full value of the initiative
- Allow good exposure to the board's thinking and strategy
- Deliver some meaningful outputs.

All Spark Board members will then be replaced by new applicants to ensure that we have a completely fresh set of individuals bringing new ideas and a continuing cycle of diversity, which includes as many people as possible.

### Design thinking

It's important to stress that this is not the same as a mirror, shadow or junior board. The Spark Board follows no previous template and has been designed to suit Pinsent Masons. A mirror board, otherwise known as a shadow board, is typically made up of senior individuals looking to step into board roles in the

short term. A junior board typically has fixed criteria concerning the age of members and is placed a step further away from the management board. Our Spark Board takes all the good ingredients from our extensive research of boards and is designed to reflect our culture.

We had considered simply putting a junior person on the board instead, but concluded that creating what we have here goes one better. Putting one junior colleague onto the board to represent the views of thousands of colleagues around the world would place a huge amount of responsibility, pressure and expectation onto the shoulders of just one person. And it would offer only one person's perspective. The benefit of our version of this mechanism is that it offers the considered, collective thinking of eight people from right across the business.

This is only the start of the journey, but we are confident that the Spark Board can bring many benefits. We will know it's working when:

- We can see we are making better decisions because we will be better informed.
- The global board recognises that the Spark Board's research, opinions and proposals have been helpful in their decision-making processes.
- The participants have developed as individuals and potential future leaders.
- We have chosen to implement the Spark Board's proposals, they have been successful and our community feels better engaged with our board, globally. ▴

# Briefing

SMARTER LEGAL BUSINESS MANAGEMENT



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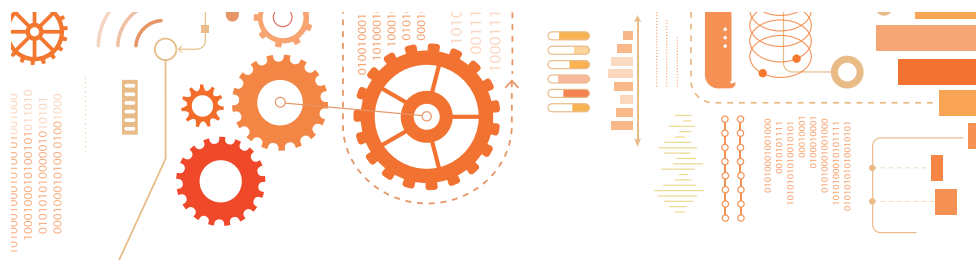
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# Need to process that?

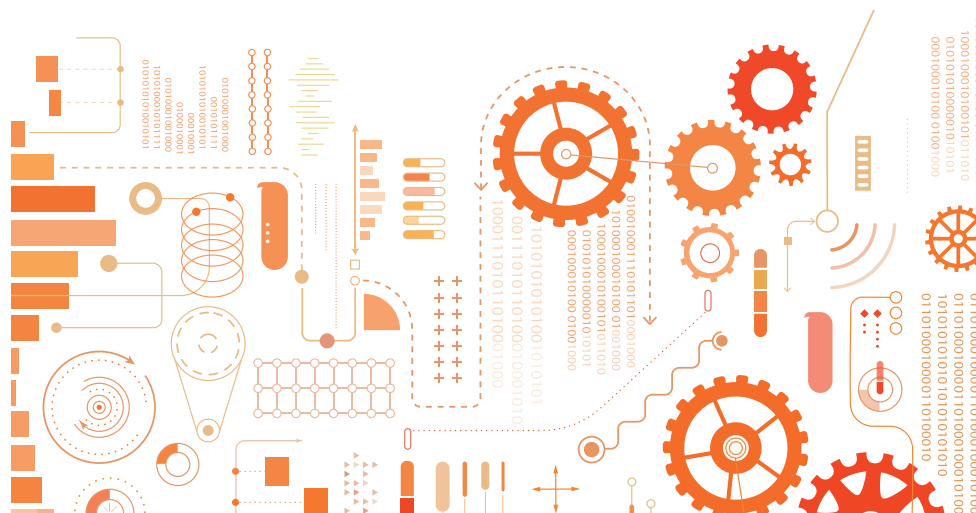
At one of our recent **Briefing** Frontiers half-day events, delegates brainstormed where they should try to apply automation to any area of the business in search of a compelling saving or a great gain. I'm not sure that I've ever seen one of these energetic interactive sessions we love to run bubbling 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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Samantha Steer explains how **Thomson Reuters** is transforming law firm productivity







# 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



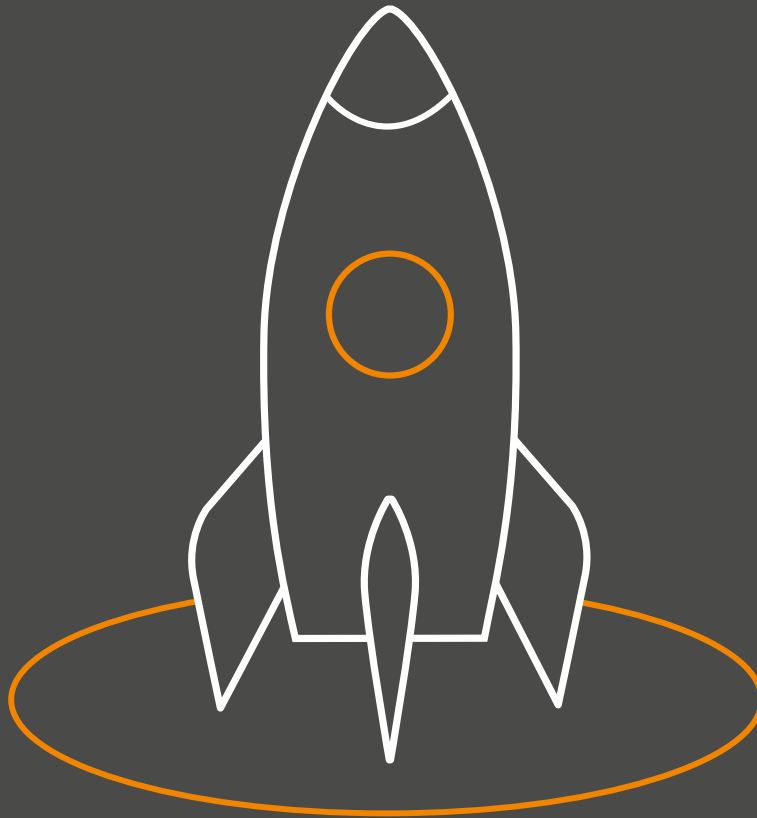
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collaboration tools. The October 2019 release of HighQ introduces solutions templating, providing for repeatable site solutions. Document bundling for transactional and litigation use cases will be available. AI Hub will be enhanced with more granular 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. ▀



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## INDUSTRY CASE STUDY

# Get the right ideas

Weightmans managing partner John Schorah, and business services and innovation director Stuart Whittle, explain how the firm organises its innovation activity, which includes a collaborative approach to maximising the opportunities of data with Thomson Reuters

**W**eightmans has long been a firm with a reputation for recognising and rewarding its business services and operational expertise. It was notably quick to take up the new opportunity – which came with shifting to an alternative business structure – to promote talent in such areas to the partnership. In May 2019, for example, innovation manager Catriona Wolfenden became the latest to join.

But what exactly is innovation at this firm? There are many strands, says business services and innovation director Stuart Whittle. In spite of this, however – not to mention all the media fascination – it's an area of work that can be surprisingly difficult to define.

"It often involves dealing with some things that you don't know you don't know," says Whittle. Innovation involves testing what already appear to be good ideas, of course. But you also need to follow threads that may uncover some of those 'unknown unknowns' and reach decisions about their implications for the business, whether promising or otherwise. The point is often made that innovators need to get comfortable with a bit of failure – which is not traditionally a comfortable thought in the law.

Two things Whittle can say, however: "Start with understanding the problem you're trying to solve. And although improving a process – for example – often involves consideration of technology, it's by no means just about that."

Weightmans talks about innovation with both a capital I and a lower-case i, he says. Small-i innovation is "ongoing continuous improvement, small changes for the better over time" – key to pulling on levers such as process efficiency and individual productivity, of course. "Then, innovation with the big I is about assessing our current mix of services, and investing in doing something more with them before somebody else does," he explains. That process may result in a new product for clients.

There's a dedicated budget to ensure investment in potential is spent wisely and not wasted, and Weightmans has recruited some data scientists – but also very important is overseeing the stream of ideas flowing in.

Managing partner John Schorah says that part of his role in this area is clarifying how the innovation engine is effectively driving strategic change in other parts of the business. However, there's also an element of keeping that engine running – for example, engaging lawyers and others to bring 'problems' forward for innovation. "I keep an eye on whether the other directors and leaders at the firm are making the most of what's coming out of the team, but we also need to ensure that enough things are going in there for it all to be worthwhile," he says.

"It's about asking and understanding what's keeping clients awake at night, and bringing that back for innovation to kick around and investigate where technology, or another product or solution,



could help them.”

Whittle continues: “If we can demonstrate that something fundamentally works and there’s a basic return on investment, then it’s back to the business owner – the person that wanted the proof-of-concept testing – to make the business case for a further sum of investment.”

### **Collaboration on innovation**

Whittle and Schorah also see the value of collaborating with Thomson Reuters to experiment and test some of their ideas. Schorah says: “There’s always a question to ask about whether we’re doing enough with the data that we have which could help clients with their own decision-making, and whether we’re managing all that data in the smartest possible way.”

**“I keep an eye on whether the other directors and leaders at the firm are making the most of what’s coming out of the team, but we also need to ensure that enough things are going in there for it all to be worthwhile.”**

*John Schorah, managing partner, Weightmans*

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## **“There’s always a question to ask about whether we’re doing enough with the data that we have which could help clients.”**

*John Schorah, managing partner, Weightmans*

A good example of this was the firm’s recent participation in the Legal Geek LegalTech Challenge, where Thomson Reuters made a year’s worth of high court data from its Westlaw tool available – approximately 2,000 cases, both full-text judgments and metadata. Firms could bring in other datasets if they wished, and were briefed to “do something really interesting with it”.

The Weightmans innovation and data teams undertook analysis on data from some 25,000 cases over 10 years (for greater accuracy), and they got it to a position where it was considered a solid starting point for a prototype court capacity-management tool. The time-to-judgment of cases with different features was modelled, which required the data to be flattened and inconsistent date formats to be rectified. The firm’s team found that it could potentially apply the tool to assessing individual court capacities for hearing cases, or to improve the predictability of a case’s timescales.

Weightmans is particularly focused on such predictive analytics work at present, continually asking if it can “derive greater meaning or actionable insight from data”, says Whittle.

“A great example is where we were recently able to visualise for a client its claims hotspots, and how those claims had been handled such that they didn’t become litigated claims because the problem had been spotted early.”

The firm has also collaborated with Thomson Reuters Labs on several areas, including automating time entry by time description (surprisingly challenging, says Whittle), and – especially topically – predicting how reputation risk could change with the tide of public opinion on certain legal subjects.

Schorah says: “As time goes by, public opinion

and policy can begin to shift both the interpretation of the law and impressions about what the law should be.” He gives the example of non-disclosure agreements (NDAs), which many years before the #MeToo movement of 2017 were seen as “perfectly respectable legally”. Data science can be pointed at publicly available information to assess such changes in sentiment and identify potential areas of concern that are on the horizon.

Even very well-established systems such as 3E and 3E MatterSphere from Thomson Reuters Elite have a part to play in the work of innovation. Whittle explains: “When we’re working on data for a client, we’re trying to get a combination of financial, people and case-management data. That’s all sucked into our data warehouse, where it becomes a lot more powerful, as it allows us to cut and display the data by many different dimensions that make it more usable.” MatterSphere is particularly “flexible” for these displays of data agility, he says, as well as facilitating more process automation of a case’s more “repeatable and predictable” components.

### **Products of partnership**

Other examples of collaboration include with the University of Liverpool to create legal problem decision trees, and also with an organisation named AuditComply to produce a (‘large I’) innovative tool that helps clients to effectively evidence how they’ve followed necessary policies and procedures when defending public or employers’ liability claims. The latter comes in a mobile version as well, which can be used to take photographs while walking around a physical site and to upload them as evidence.

And this has “applications beyond claims, as a wider governance tool”, adds Schorah – indeed, Weightmans has been using it internally for compliance with the Lexcel quality standard, ISO standards such as for information security, and for meeting its health and safety obligations.

Other internal challenges include resourcing the development work involved in tying what are usually ‘single point solutions’ together – for example, extracting information from documents,





which needs to make its way into the case management system, so the data warehouse we heard about can power all of these client-focused, future-scanning analytics projects. Therefore, Whittle says, it's very important to him that he sits alongside several others from the industry on the Thomson Reuters client advisory board, so they can convey what firms most need from suppliers in support of their accelerating innovation endeavours. After all, managing this work well is a matter of time well spent as well as money.

"We do have quite a close relationship," he says. "We are working toward the same end of improving service, and it's important to me that we try to give back as much as we take." It all feeds the appetite for innovation that shows no sign of being sated here any time soon. ▲

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**"We're trying to get a combination of financial, people and case-management data. That's all sucked into our data warehouse, where it becomes a lot more powerful, as it allows us to cut and display the data by many different dimensions that make it more usable."**

*Stuart Whittle, business services and innovation director, Weightmans*

## INDUSTRY INTERVIEW

# Wealth of your relationships

Transforming how client information is managed, shared and visualised in law firms can also lead to more predictably profitable relationship capital, says Alan Mercer at Introhive

**L**aw firms have long trailed many of their clients in terms of willingness to invest in potentially transformational technology, but signs are this has finally started to change in the last five years or so. From the training and piloting of machine learning on legal document creation, to co-creating solutions with clients in new innovation spaces, some might even go so far as to say technology has reached the very top of the strategic agenda.

But while the ‘fast failure’ ethos of experimentation is all the rage, Alan Mercer, Introhive’s legal sector director, UK and Ireland, says firms can’t afford to fail at understanding and strengthening client relationships. And technology has a critical role to play.

“This isn’t now a proof-of-concept area suitable only for some early adopters,” he says of the Introhive solution. “It’s about understanding your clients better than your competitors – an absolute must, which is fast becoming a mainstream approach.” Introhive is now working with over 80 law and professional services firms doing business in more than 100 countries, he says, with two or three more firms typically signing up each month.

“To remain competitive, a client relationship management system is not enough in itself – that’s often just a place to store contact data.” The area needing urgent action, he says, is the ability to accurately analyse, objectively measure and compare strengths of firm-wide client relationships to make more informed and focused decisions that boost the firm’s financial position.


## Understanding connections

Sometimes data can be unreliable. However, the biggest challenge for growing firms, he explains, is

bringing ‘relationship data’ held in multiple practices, systems, offices or other pockets together (if it’s stored electronically at all, that is), to create a high-level view of who knows who at firm and client, and what that could mean. By applying machine learning to such “data treasure troves”, firms can find ways to realise vast relationship capital – improved client retention, for example, as well as more profitable cross-selling. “Merging firms are really doing so to benefit from the relationship capital each holds,” says Mercer. “Relationships are still a human endeavour, but today they also leave a digital footprint – emails exchanged, calls made, meetings held, conversations and collaborations carried out.” If these digital footprints are captured and consolidated effectively, that information can be analysed for many suggestive patterns, from the number of touchpoints across multiple business functions, to the extent of senior involvement, relative reciprocity and the very cadence of communications. And all of this, well visualised, can nudge firms into making the right decisions.

“For example, busy clients today will often begin their buying process by looking for a referral,” says Mercer. “If you can easily identify that others in your firm already have some relationship with a target, that can make for a warmer introduction and facilitate improved and faster collaboration.”

Then there’s key client planning. Only 5% of client touchpoints or relationships occurring at C-level, for instance, may constitute a warning the relationship is at risk. Key performance indicators could be put in place for introducing more connections, and getting further away from the so-called ‘bow tie’ way of doing business (only a very few on each side knowing one another well)



**“Is there a correlation between effort expended on a client and its revenue and profitability levels?”**

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to something much more multi-faceted. And firms can also scenario-plan for risk factors playing out, such as a key contact leaving either business.

As well as visualising unfolding developments – such as a relationship deteriorating or improving over time – Introhive also enables comparison. Each client can be ‘scored’, which may trigger an alert if a score drops compared to others bringing in similar amounts of revenue, for example.

And a third application of the insight could be in adapting business-development activity. “Did a large event, which invited several senior people from a key client, generate any sort of relationship spike?” asks Mercer. “And is there a correlation between effort expended on a client and its revenue and profitability levels?”

Certainly, failure to appreciate all relationship touchpoints can lead to “poorer client experience”, which may inadvertently place some work at risk, he says. “One firm caused exasperation by arranging multiple client meetings in a single week with virtually the same people in attendance.”

Introhive tackles these challenges, and more, by offering people instant access to the trend analysis and underlying data, as well as automated pre-event reports about relationship strength, which can then even be augmented with other system data such as billing or performance management. “Most partners simply want the information to

hand, easily understandable, at the point it becomes really relevant. Where these insights can be a real eye-opener is in advance of a client meeting.” They could have a quick internal conversation, say something different to the client, or even invite a colleague along, to try to make the most of the relationship capital.

### **Clean and clear**

Of course, firms do need to take care what they do with data, and Mercer notes that the arrival of the European Union General Data Protection Regulation (GDPR) in 2018 prompted them to appreciate both the power and the risk of the data they hold, and “clean it up” in every respect.

Introhive’s technology already identifies and adds appropriate contact details that lawyers may have omitted – such as in email signatures – to help improve data quality. And a recent addition, for data stewards, is a product appropriately called ‘Cleanse’ (currently available on Salesforce and Microsoft Dynamics-based CRMs), which automatically updates details such as name changes, new locations and contact details, promotions and other job moves.

The bottom line is that more accurately detailed knowledge of every client relationship can have a significant impact on the bottom line, improving a firm’s ability to both collaborate and compete. ▲





# Welcome tradition

The arrival of Maud Rousseau as managing partner marks the beginning of a new chapter for Propero Partners, but at the same time as being future-focused she urges firms to get back in touch with some traditional business marketing principles

**W**hat does an organisation that offers creative advice for a living do when presented with a 'blank canvas' all of its own? Maud Rousseau, the new leader of the award-winning professional services marketing agency Propero Partners, arrives to decide just that. Bringing to the top table plenty of experience in the art of brand-crafting, she clearly relishes the challenge of business change.

"Professional services is the world I love; I've spent my whole life working in it, and here I have the opportunity to establish a new team and really

put my own stamp on enhancing the operation," she says eagerly. But as well as forging an exciting future with all the appetite for innovation you'd expect in this fast-changing market, her strategy also involves some looking back and reconnecting with techniques that have long worked well, but sometimes seem forgotten as platforms proliferate around us. "Clearly, we're guiding our clients into the modern world of marketing. However, we also need to remind them of the value of more traditional approaches to communication. Those still have a place in firms, and sometimes they're



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what appear to be most absent in a strategy.”

### Lost foundations

“I want us to go back to some basics. Businesses can forget that the foundation of a strategy really ought to be having regular, really engaging content, and delivering that through effective PR communication and involvement of the press. That may include online activity of course, but there’s definitely still a place for direct mail, especially in professional services.”

Why so? “Loyalty is hard to win by any route, but it’s a lot harder to build among those surfing for online services – whereas more traditional activity can cement the authenticity of a brand. Edgy campaigns, lead generation, social media and SEO are all great, but it isn’t only online that you create amazing brand awareness and return on investment.”

And Rousseau should know – boasting a track record that includes being on the team that took property website Rightmove through to IPO in 2006, she also revived the “tired” brand of conveyancing search provider SearchFlow from 2015 to 2018, taking it from number two in the market to number one, she says.

Indeed, she’s already practising what she preaches, busy focusing on some absolute business fundamentals during her first few weeks. “I’ve been talking and listening to clients on both sides of the Atlantic, assessing service agreements, and identifying potential improvements to their packages,” she says. “I’ve also hired a new client service manager to think very hard about clients’ journeys with us. That’s another thing law firms should be doing to help nurture client loyalty – investing in understanding what works and what doesn’t for each client – but they often don’t even follow up on a client experience after completion with a simple letter or service questionnaire.”

Propero Partners will be carefully avoiding any such communication pitfalls on Rousseau’s watch, as well as communicating very frankly with clients about ways to improve their marketing practices.

However, she says the agency can also take control of the complete content-marketing journey. “We can either visit a firm and – for

**“Edgy campaigns, lead generation, social media and SEO are all great, but it isn’t only online that you create amazing brand awareness and return on investment.”**

example – run a marketing workshop for the lawyers on content strategy, choosing the right channels, demonstrating return, and launching a lead generation campaign off the back of that activity, or we can just as easily run everything from under one roof here. However, irrespective of the choice these firms make, what must come first is their commitment to looking after the leads that are generated.”

### Follow the brand

When we speak, Rousseau is also preparing for a big property conference at the Law Society – an environment she knows well from her time as the marketing and communications director behind establishing the brand of the now-retired Veyo e-conveyancing portal. Again, it seemed a sensible place to begin her role in building the reputation of her new business.

“We actually had over half the market signed up to buy Veyo eventually, so that was an incredible journey for me. Propero neither wants nor needs to pick just one area of the law to focus its services on, but I do know that market especially well. It’s a very competitive event, and I wanted us to be there. Another important area of marketing expertise is brand awareness,” she laughs.

**Briefing** has seen many firms ‘refresh’ their brand identities in recent years – but are they going about it the right way? One common mistake can be seeing a rebrand as a destination rather than the start of something, explains Rousseau. “You want a brand new website, but what are you going to do with it once there? Is there a communication strategy for clients and prospects?” Firms must invest in creative digital transformation to compete as buyers change channels, but that always needs to be backed up by effective marketing basics. ▀

## INDUSTRY INTERVIEW

# Going global

Avaneesh Marwaha, CEO of Litera Microsystems, explains the company's strategy to increase its global footprint and simplify the relationship firms have with technology

**S**ince becoming CEO in 2016, Avaneesh Marwaha has led Litera to become a leader in the legal industry, providing solutions that remove a lot of the tedious, non-legal work that goes into creating documents – everything from drafting, proofreading and comparing, through to repairing and cleaning them.

Looking to the future, Marwaha's vision for the company is simple: a relentless focus not only on Litera's customers, but its customers' clients as well. "We want to be hyper-focused on the end user, providing them with a better experience creating and tracking their documents, and enabling them to engage their clients in a more productive manner," he says.

Executing this vision is a challenge that is met by Litera's solutions – which are carefully thought through to achieve three outcomes for customers. "First, we want to help the firm retain clients at a higher rate by enabling higher-quality work, on time, within budget. Second, we help them increase their realisation rates by removing unbillable tasks from day-to-day work," he says. The third ideal outcome – increasing the end user's happiness and allowing them to focus on what matters – is in tune with the 24/7 nature of modern legal practice: "A lot of document drafting occurs between 5pm and 5am. Technology should be right there, helping the end user."

These three ideal outcomes lie behind not only Litera's vigorous acquisition strategy (more on that later), but its product strategy – focusing on solutions that neatly insert themselves into those often-overlooked tasks that are a part of a lawyer's daily work. One example familiar to all lawyers – reusing a past document to create a first draft of a new one. "The lawyer will save it as 'new' and start cleaning it up," says Marwaha.

At first glance, this process, done in Word, is as tech-enabled as it could be. However, Marwaha, a former lawyer, teases out "multiple touch points"

where Litera's technology can intervene: "We can remove old content and put a new document together; proofread it to make sure there are no inconsistent phrases or defined terms. We ensure that the content is cleaned or removed correctly to protect the firm from unnecessary risk.

"We're not going to tell a lawyer how to draft something better, but we simplify the workflow and help make the first draft as good as the final draft."

## Transaction management

This same attention to the minutiae of a lawyer's job is now carried over into Litera's extended focus – transaction management. Marwaha believes the platform can introduce more transparency to the processes involved in certain transactions – from refinancing deals, through to M&As and IPOs. "In a paper-driven world, a lot of the work between counsel, banks and the customer is hidden – you don't always know the status of the deal. A transaction management platform offers better transparency, accuracy and a significant reduction in write-offs related to the deal," he explains.

It was relatively recently that Litera identified transaction management as an area ready for disruption. "Part of our job as a leader in this space is to identify other critical workflows that can be aided by technology," notes Marwaha. And it came out of the company's experience when Litera was purchased by private equity firm Hg in May 2019. "It involved a large transaction price. There were multiple lawyers, banks and other stakeholders included in the process. And it was 100% paper-driven. We experienced what it felt like to handle a transaction of that magnitude, with all the delays, inaccuracies, and risk." They investigated further and found a gap in the market. "There are five or six vendors in this space, and no one is really telling the story in the right way. We immediately validated that this was an important area, ripe for disruption, and we're doing that within weeks of



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our acquisitions.”

Marwaha is talking here about the two acquisitions Litera made in rapid succession over the summer of 2019 – Doxly (a secure portal for end-to-end transactions) and Workshare Transact (which converts a firm’s deal checklist into an online workspace). “Workshare Transact was doing a great job in the EU and the UK while Doxly was making significant headway in the North American market. So, overnight, we established a global customer base and the ability to provide our existing customers with capabilities that extend beyond document drafting and our current Litera Desktop offering,” he says, referring to Litera’s toolbar that displays and links the user to everything they need to draft a document. “The nuanced laws in the UK; the acceptance of e-signature in the US – we can support all of that now under one platform, one brand, one support team and one billing provider,” he says.

“As we become the de facto player in the transaction management space, we will significantly extend the component of the

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workflow we support to include the collaboration between lawyers, their clients and

opposing counsels,” he continues.

Litera’s planned integration of Doxly and Workshare Transact will create an end-to-end solution that doesn’t currently exist in the market: “It’s one seamless tool for multiple practices, multiple offices, and multiple countries. We continuously invest in the product, and in research and development, so what firms are getting is a long-term vision and improvement in the product over time.”

The acquisitions offer other benefits. He says both Litera and Workshare had become market leaders in the comparison space with two different products, yet were restricted by how far they could go because each held their own patents. “Now we’re not restricted by intellectual property; all the patents are available to a single product. Our net result is a strong offering,” he says.

The addition of Doxly and Workshare also means better product development, customer support and services. “At the scale we’re at now, we can bring ideas to the table faster; for example, we’re looking to quickly add key feature functionality. We can also support customers in every time zone – that’s important to me.”

Litera’s solutions can also play a key role in giving firms the confidence to offer fixed fees, he adds. “The tools that we have developed have really helped firms protect their unbillable time waste. We can help protect them in terms of how much time is spent creating a final draft.” The problem of time waste extends to other workflows too – such as the sending of an invoice after a deal closes. Marwaha saw how, after the invoice is sent, junior associates spend hours collating the final book, making copies, scanning and getting signatures. “There’s no reason that work cannot be done before an invoice goes out,” he says.

### A painless future

There are perhaps an unknowable number of pain points in a lawyer’s day but Marwaha will continue to try to find them. And Litera will continue to innovate beyond the document and transaction management spaces. “I’m not just looking to solve today’s pain points, but future ones too. We want to be the leader in this space and help law firms draft better documents and close deals faster,” he says. ▀

## INDUSTRY CASE STUDY

# Dispersed demands

Maurice Tunney, director of technology and innovation at Keystone Law, explains why a firm disrupting the market, and with plans to keep growing faster in future, needed NetDocuments to do so efficiently and safely

**K**eystone Law is a firm with a clear track record in turning the pursuit of ‘doing things differently’ into results. A pioneer of the agile-working model – harnessing technology to enable flexible working to be more rule than exception – in November 2017 it also became the third UK law firm to decide to list on the London Stock Exchange, with all that entails. And in its marketing the firm appeals directly to those who want to improve their work/life balance by dispensing with many of the trappings of the traditional law firm.

In the first full year post-IPO, revenue hit £42.7m. Now, for the six months ending 31 July 2019, it recently announced 15.3% and 15.4% rises in revenue and profit before tax respectively – and a ‘special dividend’ of 8p per share. At the same time, total lawyer headcount increased by 34 (27 of whom are ‘principal lawyers’ – business-owning lawyers), and it has taken on a second floor at its London HQ to meet associated increased demand for client meeting rooms and desk space, including hotdesking facilities. Around 300 of the firm’s lawyers are self-employed – having access to this space and keeping a share of the revenue they generate from anywhere they happen to be – and they’re supported by a smaller central team, which includes, of course, business services.

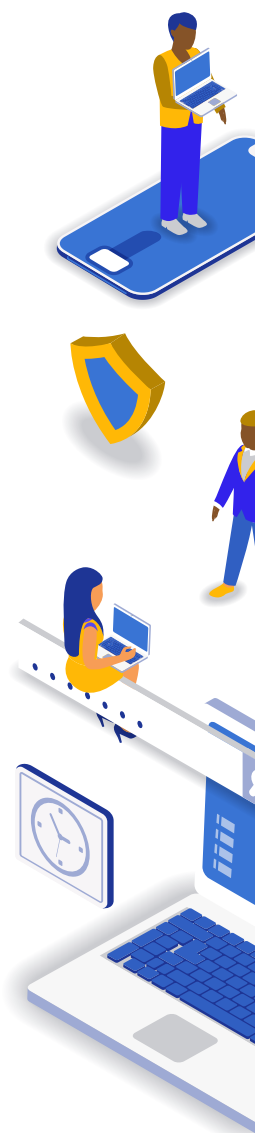
Director of technology and innovation, Maurice Tunney, explains that the IT solutions required to make a model like this work have to deliver on two fronts – fulfilling the vision of true flexibility (the firm’s branding, after all, declares ‘Law set free’) but with top-notch security standing by to protect that work. And that’s why, back in 2015, the firm turned to NetDocuments for its cloud-based document and email management needs.

In fact, it was the risk and compliance point that was the initial driver for an IT change, says Tunney. It stands to reason that the highly dispersed model leads to rather greater risk that a laptop or other device may go astray; and then there’s simply keeping the documents in good order, day-to-day. “The lawyers really just want to focus on the work and keeping their clients happy – carrying out file reviews, and so on, are less of a priority for them than for us,” he explains. “However, where the compliance advantages of having NetDocuments really stand out is when there’s a sudden problem. If a laptop crashes or is stolen, as everything is in the cloud, the lawyer or we in IT can literally pick up another machine to gain access again, instantly. When you see the relief on the individual’s face, you realise you can’t take that level of business continuity for granted, as much as we now perhaps do.” Of course, he adds, the level of encryption and the firm’s control over the process – such as thorough device wiping – are essential to that positive experience.

## On the road works

Another potential pitfall if you could be working from any corner of the country is poor connectivity. Tunney continues: “A lot of our lawyers are what you might call ‘road warriors’. They don’t necessarily have a secure internet connection 100% of the time, but they need to access the same materials as if they did to provide that consistent service.” This emerged as a challenge in the pilot phase of the NetDocuments project, but the team immediately had a solution for Tunney, he says – ndSync.

“It’s an offline version, enabling you to save your







For more information, visit:  
[www.netdocuments.com](http://www.netdocuments.com)

Another example is efficient client onboarding. The platform is integrated with the firm's internally developed intranet, dubbed Keyed-In, which is where this process is housed. Tunney explains: "A lawyer can literally create a new client matter in our system – a matter workspace – and start working in around five minutes. There are anti-money laundering and some other compliance questions to clear first, of course, but that also happens very quickly and efficiently in the background."

The experience of such seamlessness needs to be evident from the word go, however, fulfilling the brand promise for the pipeline of new joiners flowing in. "We had around 100 lawyers at the firm when we first implemented, and we didn't go live with all of them at once for obvious reasons. But now the scalability is great, and indeed automated – the new lawyer is sent a link, details are confirmed, and that immediately sends a contract off electronically, which in turn kicks off a number of tasks such as setup within the email system. Again, technology's role is to be as efficient as possible so lawyers can focus fully on client work." More recently, he adds, Keystone has introduced predictive email filing to relieve some admin burdens further still.

**"A lawyer can literally create a new client matter in our system – a matter workspace – and start working in around five minutes."**

current documents locally on an encrypted hard drive. It then syncs the relevant matters back to storage in the cloud when you have a connection. The lawyer simply details the matters, and it creates a folder structure within the device." The business case for the agile-friendly firm is pretty clear, but he spells it out. "People can have all their documents to hand whenever they need them."

Collaboration is clearly also important – and increasingly so as the firm rapidly expands – but many of these lawyers are effectively running their own businesses. So IT needs to support the pressure of that, and the agility NetDocuments offers plays a big part in doing so successfully.

### Extra intuition

Tunney admits that widespread change – even to much better ways of working – can always throw up management challenges. Notably, a large number of people arriving at Keystone will be very familiar indeed with another document management system. However, he says that the "incredibly intuitive user experience" has done a huge amount to get buy-in for the new functionality and possibilities faster than would otherwise be the case. Training only needs to take around one hour on induction day. "It's intuitive enough for us to show a high-level demo, give a few tips and tricks, and then say, 'try it'. A follow-up session in a couple of weeks then provides an opportunity to pick up on any questions or problems." ▴



## INDUSTRY INTERVIEW

# A tale of two ways to innovate

Catherine Kidd, market development lead, global large law, at Thomson Reuters, explains the different ways in which law firms are approaching innovation strategy

**A**s market development lead for large law firms at Thomson Reuters, Catherine Kidd's role includes spending a lot of time uncovering what challenges its customers are experiencing. Recently, she has found herself talking to firms and in-house teams a lot about their innovation strategies.

Kidd has seen a clear distinction between the use of proactive and reactive innovation strategies. "Firms with a proactive strategy typically have a research and development function that looks at the future of services, what 'productising services' for their clients will look like, and what people and processes they should be putting in place," she says. This then starts conversations about partnerships: "Looking at not just technology solutions, but consultants, vendors, and even clients to some extent, in order to predict what could be next."

In contrast, reactive firms, although they understand the need to innovate, will apply solutions on a problem-by-problem basis, rather than pre-empting the problem. There are a number of reasons for this approach. "It could be a client driving that by putting pressure on them around, for example, the cost of a type of transaction. Or it could be about headcounts or financial restrictions," she says.

She also sees some regional differences between how firms look at innovation: "Firms in Leeds and London tend to have a positive attitude to experimentation." She contrasts this with her experience with Birmingham and Bristol firms. "They're happy to be late adopters; they want other people to test it first, then they'll do it," she says.

Proactive firms also appear to approach process change differently. "They're being smart about it. They're not throwing technology at a problem but looking at it end-to-end in order to understand

what the client ultimately wants. When I talk to people in Leeds and London, there's a lot of talk about dissecting the problem and then applying people, a process or tool. They have teams with different skillsets, including process management and technology professionals, as well as fee earners working together," she says.

She contrasts this with the "fragmented" approach to process change taken by more reactive firms. "They look to what other services have done. Also, they might hire a lawyer who says 'at my old firm, we used to do this' – and apply that process as a point solution for a particular challenge – but there is limited evaluation of the overall problem."

Kidd recalls one general counsel telling her that the real change is coming from firms who are innovating how they deliver legal process. "They're coming to the client with a proposed solution to the best way to deal with, for example, a regulatory change. And it's a modelled solution in terms of the legal support needed to work around the tools that are needed to deliver that effectively and efficiently," she says.

She also points out the tendency among some firms to have an "absolute responsiveness" to the tools that clients want them to use. "If it's in an RFP, or if the client says that you have to use this tool, then they will use that. It's reactive panic," she says. "Those firms with a clearly defined tech strategy are able to evaluate the client request, and where appropriate respond to the client with an appropriate alternative, rather than simply procuring the tool that has been requested without a clear understanding of the need," she points out.

## Simple solutions

According to Kidd, firms are almost universally happy to buy technology and use a small





PHOTO CREDIT: SIMON BRANDON

proportion of its functionality to solve a problem. And a corresponding, quite common, complaint was vendors offering “all-singing, all-dancing” solutions. “Often, it’s just one feature which does a task well,” says Kidd. “They’d rather the market offered a solution that not only does one thing really well, but can connect with other solutions. Their top-two feature requirements for a tool were the ability to use it right away, and that data was able to be extracted for analysis and passed to the client,” she says.

Some firms Kidd has spoken to have articulated the kind of support they expect from vendors. “They want their hands held through it. They want help with articulating the ‘so what’ to the lawyers – the reason for using these tools. If it’s not something that lawyers can just pick up and use easily and intuitively, that creates a serious adoption challenge,” she says.

Duplication of solutions within a firm can also be an issue; a problem proliferated by the startup boom. “For firms with central teams – a knowledge management, innovation, or tech team – there’s a drive around having centralised solutions and ensuring they’re getting the best value from the solutions that they already have before they look for other tools,” she says. She contrasts this with

situations where the buying decision is driven by individual practice areas, which is more common in smaller firms. “Multiple solutions in the firm might do similar things because somebody spoke to a finance partner and that partner said ‘this is perfect for finance’ – but there’s actually an equivalent tool already being used in corporate, for example,” she says.

### Ahead of the competition

Kidd doesn’t see law firms being particularly concerned about the ‘threat’ posed by the Big Four accountancy firms – their focus is more on how they differentiate themselves within the legal industry. However, she thinks that firms with a proactive innovation strategy are more aware of their clients’ changing expectations. “These firms are hiring different sets of people who can go in and differentiate the client services, expand and better productise services,” she says.

And what about firms who aren’t as proactive on innovation? “The Big Four, and other alternatives, are on their radars, but it comes down to price and cost, and differentiating legal expertise rather than trying to differentiate against a different type of competitor,” she says. ▴

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## OUT OF OFFICE

# Box office politics

Chris Bryant, partner and head of Bryan Cave Leighton Paisner's Brexit task force, on the business of combining legal and show business through a bit of flexibility



I've been writing musicals as a hobby for a long time. The rest of the time I head up BCLP's Brexit task force, helping clients navigate Brexit and plan for what a no-deal scenario might mean, including looking at corporate structure, regulatory approvals, even helping companies to restructure supply chains where necessary. That started off in an ad hoc way in the runup to the 2016 referendum; afterwards, a colleague flippantly joked that I should write 'Brexit the Musical'. I thought it sounded like quite a good idea.

So, in the days immediately after the vote, I thought out the basics of the plot. Being a lawyer, I trademarked the name and, through some contacts, I spoke to a producer who was interested – and it progressed from there.

I was working on it in the March and April, and then Theresa May had the audacity to call a general election – which interfered with my plot, so I had to do a bit of rewriting. BCLP was very supportive – I started working a nine-day fortnight to focus on writing the show. I kept that up for a year and a half, before I went down to three days a week when my eldest daughter was born. Eventually, we went to the Edinburgh Fringe in August 2017 and the show ran for the whole month of the festival.

Everything I'd written before had been much smaller – I've not had anything as controversial or as successful as this. Typically, you take your time and wait until you're 100% happy. This was different – it had an immediacy to it and, if I was going to do something, I had to get it out there quickly.

BCLP loved the idea. The whole cast came down from Edinburgh and we ran it for a week in the firm's auditorium, including four packed-out client events, both for Brexit-related clients and others – it went down a treat. We had to put up parental advisory warnings – there was some

choice language in there shall we say, and I was a bit nervous sitting behind our managing partner while watching it. I'd say it was one of the most surreal but fun weeks in my working life.

One of my two favourite songs is probably 'Mother Knows Best', written for our version of Andrea Leadsom, based on the infamous interview in the runup to the leadership election. That was one of the most musically ambitious songs I've written – it's in a very Broadway, jazzy style, complete with tap-dancing. My other favourite is for the Boris Johnson character, called 'Look at Me Foreign Secretary' – that's always a hit with audiences.

I still work three days a week, and I try to be in the office, but there's certainly no presenteeism. It can be a challenge sometimes to balance things, but I try to ring-fence time with my daughters – we now have number two – and then I can focus my attention around that. My partner has a four-day week arrangement, so sometimes I need to swap around my usual working days, but generally it works out.

Something that was missing early in my career was prominent role models, particularly male ones, who committed to flexible-working arrangements. I think it's hugely important for people coming up in their careers to see that it can be done and be inspired to try and make it happen.

At the moment I'm working on an updated version of the musical for a UK tour. There will be some new songs and characters that didn't make an appearance back in 2017 – for instance, Mr Rees-Mogg didn't feature at all in 2017, plus I've had to incorporate a few new plot twists since then. Currently we're waiting for things to stabilise enough for us to be able to put out something we won't have to keep updating every five minutes.

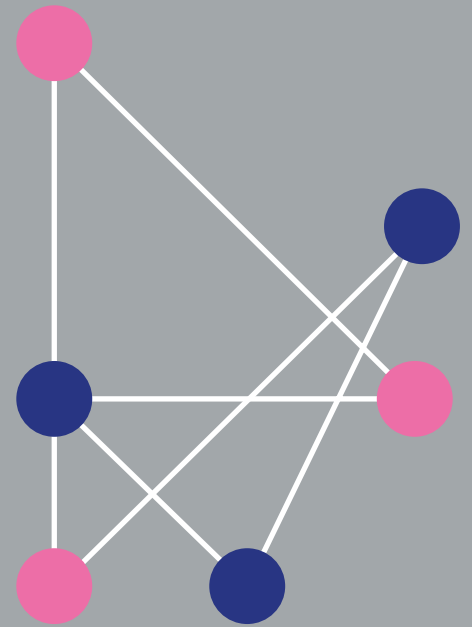
*As told to Josh Adcock.* ▴

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# Briefing

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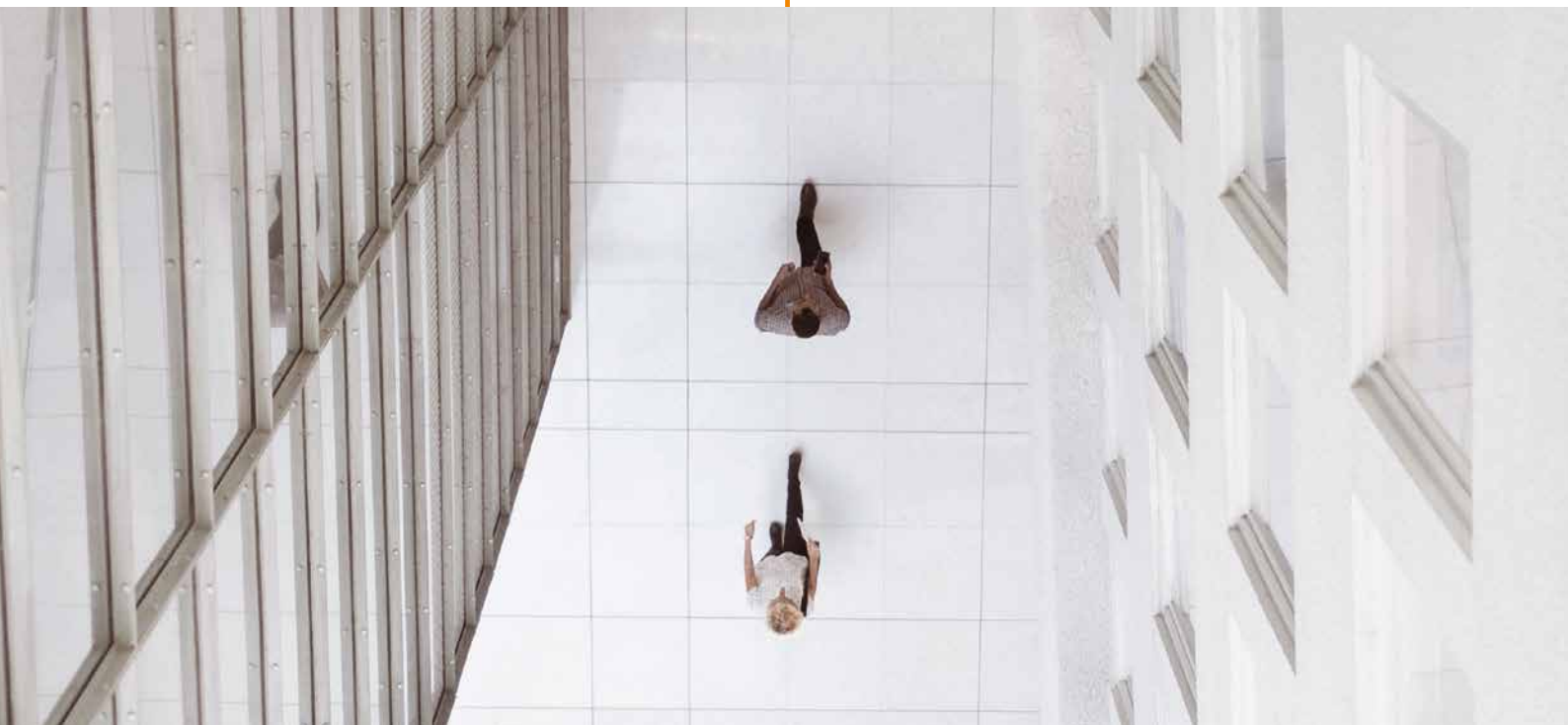
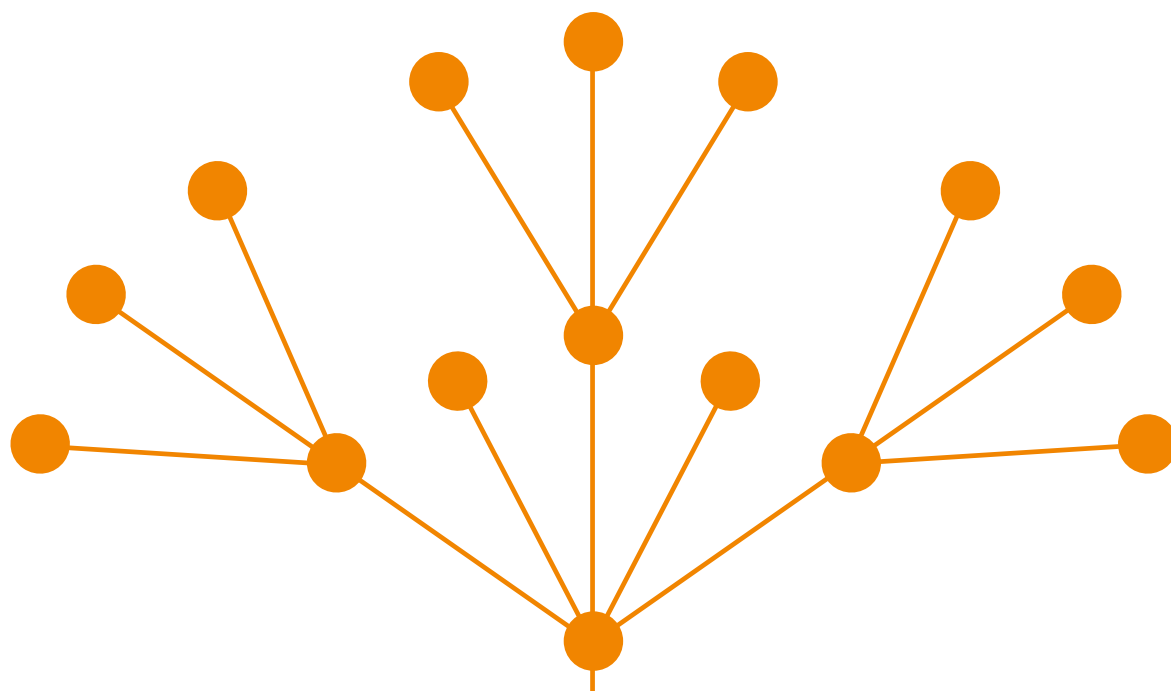
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