

# legal*i* insider

## THE ORANGE RAG

May 2022

Issue 352



# EDITOR'S NOTE

Welcome to the May Orange Rag, where the month has been dominated by a raft of announcements of funding or acquisitions in the contract lifecycle management space, most of which were deliberately timed to coincide with the Corporate Legal Operations Consortium conference. See our top stories for details of the four major CLM deals announced in May, plus we have some exclusive data to share with you on the total sums raised this year compared with last.

In other exciting news closer to home, Legal IT Insider's brand-new events page is now up and running on [www.legaltechnology.com](http://www.legaltechnology.com). This has been on my wish list for about two years so it's great to finally see it up and available to all. You can load your own events and use the diary to plan your dates ahead. It will rely to a large extent on you populating it, so please make the time to do that – it's free publicity for your event if nothing else. The events page is clearly visible on the home page and 'add your upcoming event' is available as a drop-down option.

We are also just about to launch a global customer relationship management report, researched and written by lead analyst Neil Cameron. It will be a deep dive into the CRM systems on the market and their functionality, and is part of a series of scheduled reports that will be hugely valuable to the market in terms of assessing what's out there for you. To find out how to get involved, contact our head of digital, [emma@legaltechnology.com](mailto:emma@legaltechnology.com)

Our vendor of the month is cloud-based litigation management provider Opus 2, which has just gone live at Linklaters for global investigations, as well as entered a technology partnership with the Scottish Arbitration Centre to boost international arbitration in Scotland. In May, Opus 2 launched two new subscription services for law firms and chambers.

Our law firm of the month is Mayer Brown, which in May launched a flat fee tech + services offering in partnership with Factor and Acadia. See our North America wins and deals section for more on that.

**Caroline Hill**

Editor-in-Chief, Legal IT Insider



## TOP STORIES

# CLM FUNDING HITS OVER A BILLION DOLLARS IN THE FIRST FIVE MONTHS OF 2022

Funding in the contract lifecycle management space reached a record high in May, with investment in 2022 now exceeding \$1bn and up by over 50% on this time last year.

On 10 May - timed to coincide with the Corporate Legal Operations Consortium conference - SirionLabs announced a fresh round of finance, raising \$85m in Series D funding led by Partners Group, a leading global private markets firm.

On 11 May – also timed to hit CLOC - no-code CLM vendor Evisort announced that it has raised \$100m in capital, including equity and venture debt financing. The announcement follows recent key executive hires, including Michaela Dempsey of Workday as chief marketing officer, Steve Tucker of DocuSign as chief sales officer, and Dwight Krossa of Knowable as vice president of product.

Another big announcement during the conference was that LexisNexis Legal & Professional has acquired CLM vendor Parley Pro, which will form part of LexisNexis' enterprise legal management (ELM) platform CounselLink.

You would be forgiven for thinking that was enough for one month for CLM, but on 18 May, France-founded SaaS corporate governance and contract management provider DiliTrust, announced that it has raised €130m.

These giant raises follow the \$100m Series C from LinkSquares in April, and the \$150m Series E raised by Ironclad in January.

According to exclusive data shared with Legal IT Insider by our information partner Legalcomplex.com, in the year to date, \$1.78bn has been raised in the CLM space across 74 deals. Compared with this time last year, that investment sum is 54.3% up.

If you were in any doubt that corporate legal teams are digitising the way they operate – or at least attempting to - these numbers speak volumes. Cyrus Driver, managing director of private equity, technology at Partners Group, who will join the SirionLabs board of directors, observed: "The addressable market for CLM is expanding rapidly as more organizations undertake digital transformation initiatives."

Once upon a time, talking to the corporate legal ops community, it was clear that the larger and more outspoken corporate teams and CLOC leaders were doing the do, with many others doing the panicking.

That is changing aided by the growth of legal operations roles and growing evidence of the efficiencies and savings that CLM can bring. Those savings come not just from creating proper storage and workflow around your contracts, but from the hugely valuable data that the systems capture. "Every time an organization buys, sells, hires, or otherwise transacts, it creates a contractual data layer. We created Evisort because it is absolutely critical for organizations to easily access and manage this data inside their contracts," said Evisort's co-founder and CEO Jerry Ting at the time the \$100m raise was announced.

The catch is that much like anything, CLM systems only work if you have the right people and processes in place, and in-house legal teams are hugely overstretched. No wonder that law firms such as Baker & McKenzie and Norton Rose Fulbright are building fully-fledged client facing legal operations teams. Law firms ought to be sharing their learnings on the dos and don'ts of buying and implementing technology at a time when there is a risk that corporate legal teams will rush into decisions that they can't easily extricate themselves from.

Take a look at our wins and deals section for more details on all of the CLM announcements in May.

## TOP STORIES

# INTERVIEW: INTAPP LAUNCHES DOCUMENTS FOR CORPORATE LEGAL

Intapp in May launched Intapp Documents for Corporate Legal, building on its Repstor acquisition to package up a Microsoft 365-based document and matter management system for in-house teams.

The new offering, which is supported by a partner ecosystem that includes KPMG, brings together three pillars: document management (SharePoint), workspaces (Microsoft Teams provisioning) and client collaboration (SharePoint and Teams). While Intapp may have bought Repstor largely for its ability to provision Teams, it has swiftly realised the potential in terms of its combined offering.

Speaking to Legal IT Insider, Sheila Gormley, founder of Repstor, which was acquired by Intapp in 2021, said: “There's been ongoing investment across all areas and documents for corporate legal meets the specific needs of corporate legal teams. It's very matter centric but also wraps its arms around the matter lifecycle, so new instructions; intake; triage; matter workspaces; and managing security – all your day-to-day work but leveraging the wider 365 platform so you get insights into the types of work being done and where matters are stuck.”

Each pillar continues to be available separately and Gormley says that there continues to be a huge demand in the corporate legal sector for Teams provisioning and enabling in-house users to surface their world in that one application. Intapp recognises that many corporates use iManage or NetDocuments and its DMS connector for collaboration in a Teams environment is a core part of its offering.

But with corporates and law firms looking at how to fully leverage their Microsoft stack, the combination of Repstor's technology and the firepower of Intapp may have turned out to be more powerful than Intapp at first envisaged.

## TOP STORIES

# LEGAL IT INSIDER'S EVENTS PAGE IS LIVE!

Legal IT Insider's events page is now live, and you can look for all upcoming legal tech events as well as load your own. This has been on the to-do list for a long time, and we hope that it will be a really valuable resource, particularly now that the industry is getting together in person again, and planning events has once again become a bit of a lottery in terms of avoiding clashes.

Take a look at all upcoming events here

Load your own here

Both are easily accessible on the home page [www.legaltechnology.com](http://www.legaltechnology.com)

This is one of the many projects that we are working on to make the site more valuable than ever, and we'll keep you posted of other changes as they happen.

# TOP STORIES

## BRAND NEW CRM REPORT ABOUT TO LAUNCH

Legal IT Insider is about to launch a brand-new CRM report, which will be a comparative review of the CRM systems available on the market and their functionality. Conducted by legal technology analyst Neil Cameron, the review will address with the generic cost, quality and risk management benefits of the software, as well as comparing and contrasting the features of a wide range of CRM products. It will also look at market penetration, and the likely future development direction of this range of software with new tools such as Artificial Intelligence.

To find out more please contact our head of digital Emma Griffiths on [emma@legaltechnology.com](mailto:emma@legaltechnology.com)

# TALKING TECH

## LIVE Q&A WITH THE FOUNDER OF THE NATIONAL CYBER SECURITY CENTRE

On 29 June, Legal IT Insider will be hosting a live virtual Q&A with Ciaran Martin CB, the founder and first CEO of the National Cyber Security Centre, which is part of GCHQ. Hosted in association with global cybersecurity company Red Sift, for which Martin is a special adviser, we welcome all of your questions around cybersecurity and risk and Martin will give us his thoughts on:

- The new cyber dimension to war – is it Y2K-style hype or a serious underlying issue?
- The 2021 ransomware crisis – what have we learned?
- When we have stopped looking East at Russia, will we look further East, at the tech race between China and the West?
- CISOs – why the dynamic and conversation with the C-Suite needs to change.
- How do you assess risk in the legal sector? One approach does not fit all, you have to calibrate the threat.
- And why it's nonsense that people are the weakest link.

Martin is currently professor of practice in the management of public organisations at Oxford University. He led a fundamental shift in the UK's approach to cyber security in the second half of the last decade, successfully advocating for a wholesale change of approach towards a more interventionist posture. This was adopted by the Government in the 2015 National Security Strategy.

You can register to join the conversation and tell us in advance what question you want to ask here

This will be an interactive session and we will be taking live questions during the Q&A on the day.

# TALKING TECH

## THE METAVERSE – THE OPPORTUNITIES, AND THE PITFALLS

Much has been written about the metaverse and yet for many in the legal sector, it is still very much a buzzword, with little clarity on whether the virtual world represents real commercial opportunities or is yet another way to waste valuable time.

In this podcast, Legal IT Insider editor in chief Caroline Hill and Legal Practice Intelligence founder and editor David Woolstencroft spoke with metaverse adviser Gregor Pryor, who is a partner and co-chair of Reed Smith's Entertainment and Media Industry Group, and Dan Jasnow, a Washington based regulatory attorney at ArentFox Schiff, which has become the first major US law firm to enter the metaverse by acquiring a land site in Decentraland. Reed Smith's 2021 guide to the metaverse, in which Pryor advises on some of the threats and opportunities for the music business, has become one of the definitive papers to date.

We asked Pryor and Jasnow to share their knowledge and experiences to date, and we discuss some of the commercial applications for legal organisations, as well as what they need to be aware in terms of protecting their intellectual property.

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# WINS AND DEALS

## UK & EMEA

Linklaters has rolled out Opus 2 Investigations across its global network following a two-year development project, in which lawyers involved in the rollout were able to ‘buy’ hours from Linklaters’ Innovation Steering Group bank.

Linklaters has long used Opus 2 for its online hearing and trial bundling capabilities. Led by dispute resolution partner Ben Packer and financial regulation partner Nik Kiri, the firm looked for a way to digitise its investigations process, which are typically manual and paper heavy.

While Opus 2 had the closest offering to what Linklaters was looking for, the past two years have seen a significant amount of work from both sides to develop the platform, involving multiple iterations. Following a period of user acceptance testing this year, the platform went live a month ago.

Dispute resolution partner Ben Packer said: “After helping to shape and now roll out our tailored implementation of Opus 2 Investigations, we’re looking forward to maximising its potential and the benefits it offers for our clients – from considerable time-savings to closer collaboration at every step during an investigation.”

To read the full story and our interview with Packer click here: [Interview: Linklaters rolls out Opus 2 Investigations globally - Legal IT Insider \(legaltechnology.com\)](#)

UK top 50 law firm HFW has selected iManage Cloud as its platform for document and email management.

The selection comes as HFW – a leader in advising the aviation, commodities, construction, energy, insurance and shipping sectors – executes on its cloud agenda and John Court, head of technology delivery at HFW, said: “We have chosen to migrate to the iManage Cloud to support our mission and goals, leveraging technology to deliver significant business value and securing our and our client’s data,” adding: “iManage Cloud will also be a key enabler for our “Work Anywhere, Secure Everywhere” initiative.” HFW has until now used iManage on premises. It has over 1000 professionals across the Americas, Europe, the Middle East and Asia-Pacific.

We’re told that HFW chose iManage Cloud for its capability to deliver an enhanced user experience to its professionals through the solution’s new and intuitive user interface, as well as improved search and cross-border collaboration capabilities. From an organizational perspective, HFW chose iManage Cloud to enhance the firm’s security posture and global compliance with client, regulatory and insurance data requirements.

Other UK top 50 firms to have selected the iManage Cloud include magic circle firms Clifford Chance and Linklaters, as well as RPC and Burges Salmon.

Fieldfisher has completed its migration from Skype to Microsoft Teams, supported by global systems integrator Cisilion.

Since adopting Microsoft Teams, Fieldfisher says it has realised a variety of benefits, allowing the firm to improve user experience, whilst reducing the overall complexity of global collaboration. You can watch Cisilion’s YouTube video interviewing now retired IT director Mabel Harvey, new head of IT David Lish and others, here: <https://www.youtube.com/watch?v=Uf3LoDRNKsU>

Lish said: “The Cisilion delivery team were very efficient, and their experience made the transition seamless.”

As one of only a handful of system integrators in the UK with both Microsoft and Cisco Gold Partner status, Cisilion has extensive experience adapting enterprise networking, collaboration, security and data centre & cloud solutions in the enterprise market.

UK regional firm Woodfines has upgraded its BigHand licences to the full workflow management solution.

Maggie Shen, operations manager at Woodfines said: “As we move towards a centralised support staff function, we knew we needed better visibility of which tasks the lawyers were delegating to different support resources. We were impressed with the transparency BigHand Workflow Management could eventually offer us, and how it is built for law firms.”

BigHand Workflow Management is a task delegation solution that allows work to be automatically routed to the best-suited support staff and monitored throughout the process. Output reports can be used by management for visibility of key metrics like work type, volume, capacity and utilisation to allow firms to make data-driven decisions around staffing, training and performance.

Shen added: “We want to encourage hybrid working for our staff and with the workflow technology in place, we will be able to ensure that physical work is sent to those in the office, and other tasks to those at home. Any billable work completed by support staff that might currently be missed can also be picked up on and billed to the client appropriately.

“The data provided will be really valuable to management who can make informed decisions around recruitment and training, rather than anecdotal information that can be hard to quantify.”

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London headquartered law firm, Bristows LLP, has selected and deployed iTrain Legal’s training chatbot iTrain Ali, from Nikec Solutions, to assist its workforce in using legal software applications.

Having started with iManage Work10, Bristows will also be deploying chatbots to help users answer their ‘How to...’ questions for MS Teams, MS Office and pdfDocs.

iTrain Ali is an MS Teams or browser-based chatbot that provides tips and pointers to “How Do I...?” enquiries about legal applications. Supported by user guides and videos, iTrain Ali gives users real time answers 24/7.

Phil Wood, IT Director at Bristows, said “We deployed the new iManage Work10 solution during the COVID-19 pandemic, when we had to deliver our training in a very unusual way.

“We work flexibly now: colleagues are not necessarily working in the same office or at the same time. Fee earners may not always have quick, in-person, access to those who can explain how to use our software applications in the same way as before. iTrain Ali is a great way to bridge that gap.”

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Lawtons Solicitors have selected PracticeEvolve in order to maximise new business opportunities, from initial enquiry to onboarding through to the final bill.

Lawtons specialise in criminal law and have offices across nine different locations. Employing over 30 staff, they are ranked as one of the leading criminal defence solicitors in London and around the surrounding Home Counties. As a marketing savvy business, the team at Lawtons were looking for a system to easily capture and manage enquiries and to process the work faster and more efficiently.

Stephen Halloran, director and solicitor advocate at Lawtons says, “We have grown our business on our ability in understanding the need to respond to enquiries quickly in order to secure new business, particularly via the website. PracticeEvolve demonstrated how their system can capture website opportunities and respond to them in a timely manner and manage them more effectively, without having to rekey data. Similarly, PracticeEvolve is feature rich and manages both private and Legal Aid work.”

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NJORD Law Firm has selected NetDocuments as the company’s document and email management platform, in a significant European win for the US-headquartered content management system provider.

NJORD Law Firm is a full-service law firm serving local and international clients through the firm’s offices in Denmark and the Baltics region. NJORD Law Firm’s litigation department is one of the largest and most experienced among the Top 10 Danish law firms. As part of NJORD’s digital transformation journey, the firm was looking for a document and email management platform to improve productivity and enhance collaboration.

Conni Falkner, COO of NJORD, said: “As part of our digital transformation and move away from traditional paper-based ways of working, we needed an agile and customisable cloud platform that would help us to improve our internal processes and in turn provide better client services. We chose NetDocuments as it is a really intuitive system that integrates with our way of working and provides a great user experience.”

NJORD have implemented NetDocuments across their various office locations in Denmark to enable its 190 users with the ability to find, share and collaborate on documents from any location.

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Sandline Global — a global consultant for document and email management solutions with primary offices in Frankfurt, Germany — has become part of the iManage partner network.

The new partnership extends iManage’s reach in the DACH region, providing law firms of all sizes in Germany, Austria, Switzerland, and France with a new resource for making the move to the iManage platform.

“Becoming an iManage certified partner was the logical choice for us as a business,” said Ralf Kaiser, managing director of Sandline Germany GmbH. “iManage is the leading platform for knowledge work, and there is growing interest and demand among customers for iManage products. It just made sense for us to focus on what the market is asking for.”

Sandline has already delivered strong results in its new role as an iManage partner, successfully migrating German law firm Sparwasser & Schmidt in Freiburg to iManage Cloud in just 45 days including data migration.

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Specialist UK law firm BI solutions provider Katchr has entered a new referral partnership with leading law firm accountants Tilney Smith & Williamson.

“Katchr’s expertise in providing the core law firm BI metrics in a straightforward manner underpins and complements our law firm advisory role in achieving financial best practice,” said Claire Burden, national advisory consulting partner at Tilney Smith & Williamson. “Working with the information the Katchr provides we can quickly identify performance issues and mentor law firm management teams in switching behaviours to improve performance and culture.”

# WINS AND DEALS

## NORTH AMERICA

Aderant has entered into a partnership with intelligent time tracking tool Zero, which for some time has enabled users of Aderant's mobile timekeeping solution iTimekeep to capture and categorize billable time automatically. While the pair already have mutual customers, the partnership means they will be working more closely on marketing, their go-to-market strategy, and business development.

Zero runs in the background of iTimeKeep and learns from user behaviour to eliminate the administrative drag of manual time tracking. Users' time is automatically recorded and associated with the appropriate client and legal matter as a draft entry.

"We look forward to partnering with Zero to make our leading legal time capture and billing compliance software even more powerful and make our clients' practices even more productive," said Chris Cartrett, CEO at Aderant. "This integration is unique in that our clients' timekeeping practices will remain unchanged – they'll continue to log into the iTimekeep application they've come to rely on. The addition of Zero's automation layer requires no extra effort on the part of the user, as it works in the background and ensures that previously unbilled time will no longer go uncaptured. Law firms will benefit not only from passive time capture that is accurate down to the minute but also from the automatic association of captured time with the correct client matter."

Zero's automation layer for iTimeKeep is available to all Aderant clients.

International law firm Bryan Cave Leighton Paisner (BCLP) will redesign how work is allocated across its litigation practice in North America, supported by resource management capability from BigHand. The decision comes after a successful similar project within BCLP's transaction practice in the UK and Europe.

As part of this process, BCLP decided to move away from the traditional partner-led work allocation model, an approach that can create unconscious bias that limits equitable access to opportunities. In addition to meeting BCLP's inclusion goals, creating an operationally managed process for all work allocation will improve overall use of skills, smoothing out the peaks and troughs in demand throughout the lawyer population.

The project includes the creation of a dedicated resource manager role to act on behalf of partners to identify suitable associates, using data to enhance and support the process. The new role will save significant partner time, while ensuring the career plans of each individual lawyer are

considered – from the partners they want to work with to their evolving areas of interest.

The overall approach is underpinned by BigHand's resource management technology, which allows law firms to identify resources, forecast utilization, manage workloads and add structure to career development for lawyers.

"After seeing the successful implementation of our BigHand work allocation project in Europe, we look forward to extending its use to the U.S.," commented global department leader for litigation & investigations, Lee Marshall. "BigHand's approach to resource management, accompanied by its technology, means that we expect to see the same equity of work between our associates as well as helping to drive our DEI efforts."

Elevate has become the first law company to subscribe to Legal Metrics, which automates the provision of anonymous diversity data, avoiding the disclosure of personal information. Elevate, which provides consulting, technology and services to law departments and law firms including HSBC Holdings, Fitbit, Juniper Networks, VMware and Reed Smith, will also be sharing Legal Metrics with its customers. 'Law company' refers to the fact that Elevate practices as a company rather than a partnership. It identifies as much with the Big Four as much as with alternative legal services provider (ALSPs), and eschews the term 'alternative'.

It is hoped that the Elevate-Legal Metrics partnership will advance the gathering and sharing of DEI information and bring closer the goal of standardized measures of metrics that allow 'like-to-like' comparisons.

"Achieving greater diversity in the law industry is a team effort, and time is of the essence," said Pratik Patel, VP of Innovation at Elevate. "As law company involvement in legal portfolios grows, so does the responsibility to provide data and transparency to GCs and their teams. Diversity tracking is a high priority for law departments but comes with difficulties since the data tools and templates are different across customers. Working with Legal Metrics, Elevate can eliminate these problems for ourselves and our customers by making it easy to load, share, and access our diversity data without releasing sensitive data.

"Elevate will use our subscription to Legal Metrics to calculate and publish critical diversity metrics to our customers, and we encourage other law companies to join us."

Speaking to Legal IT Insider, Legal Metrics' client & community engagement lead, Ryan Steadman said: "Elevate is not just the first law company client but they are also

taking our technology to their legal departments to introduce the ability to automate diversity tracking. A lot of law firms are giving away personal information, or else under disclosing diversity. What legal departments really care about is what percentage diversity they have working on their matters. Are we giving diverse staff complex matters? They really care about that. Until recently no-one was able to give them aggregated information, but Legal Metrics can.”

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The Noble Law – a women-owned plaintiffs’ employment law firm – has selected Litify, the end-to-end legal operations platform for law firms and legal departments.

Litify will provide The Noble Law with a complete and transparent view of their customers, cases, and staff across every touchpoint.

“Working with multiple providers and products proved difficult when measuring workflow efficiency and internal productivity. Clients who reach out to us are often calling during one of the worst crises of their lives. Having data at our fingertips allows us to move quickly and thoroughly respond to our client’s needs and help them navigate what is typically a very stressful process,” said Laura Noble, founder and managing partner of The Noble Law. “Litify’s cloud-based technology will empower our staff to collaborate with clients more efficiently while enabling data-driven decisions to support successful outcomes.”

The Noble Law also chose Litify for its matter management features, which include automation and practice-specific task management and document creation capabilities.

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Intapp has entered a strategic alliance with KPMG AG to help legal organisations in their transformation journeys. This collaboration builds on KPMG’s global alliance with Microsoft and furthers Intapp’s global strategic partnership with Microsoft as well.

KPMG helps to navigate the complexity of transformation by assessing business drivers, developing a cloud strategy using interoperable technology, and implementing sustainable enterprise-level transformation including change management and communication. Intapp, meanwhile, enables the enterprise-level transformation of legal organisations’ most critical business operations.

QuisLex has announced that Boston eDiscovery services provider Datamine Discovery is its newest channel partner. The addition of a comprehensive discovery services provider like Datamine to its partner program enables QuisLex to deliver streamlined services to its clients as part of its managed document review and other litigation services.

Datamine Discovery provides a full spectrum of services for every stage of the discovery life cycle, from legal holds and forensic data collection to data processing and early case assessment and on to hosted data review and production

through Reveal. Datamine also provides expert project management, focusing on the data with responsive consultation and the latest technology, allowing legal teams to focus on case strategy.

“A meaningful partner program requires more than simply establishing partners in name only,” says QuisLex director of sales operations and partnerships David Cochran. “QuisLex dedicates time and resources to ensure successful partnerships, starting with thorough due diligence prior to onboarding any new partners. Datamine Discovery exceeded all our criteria for new partners, and we are confident our clients will benefit from working with them.”

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Control Risks, the specialist risk consultancy, is expanding its technology offering with eDiscovery and investigations provider Reveal.

“Corporate legal and compliance teams, and their outside counsel, are looking to technology to better understand data, reduce risks and costs, and extract key insights faster across an ever-increasing volume and variety of data. We look forward to leveraging Reveal’s data visualization, AI and machine learning functionality to drive innovation with our clients,” said Brad Kolacinski, a partner in Control Risks.

Control Risks will leverage the platform globally to unlock intelligence that will help clients mitigate risks across a range of areas including litigation, investigations, compliance, ethics, fraud, human resources, privacy and security.

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QuisLex, a leading alternative legal services provider, has added Boston eDiscovery services provider Datamine Discovery as its newest channel partner. The addition of a comprehensive discovery services provider like Datamine to its partner program enables QuisLex to deliver streamlined services to its clients as part of its managed document review and other litigation services.

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# MOVERS & SHAKERS

## UK AND EMEA



Global law firm Norton Rose Fulbright has appointed Alex Fortescue-Webb and Daniel Marks to co-lead and enhance the firm's legal managed services offering.



Fortescue-Webb and Marks have joined the firm from EY, where they were partners, and will focus on building tech enabled managed services solutions to help in-house legal departments deliver both

ongoing work and strategic projects more effectively. They will lead the team in Europe, Middle East and Asia (EMEA).

The legal managed services team is part of NRF Transform, the firm's global innovation and service delivery programme.

At EY, Fortescue-Webb co-led contract lifecycle management services globally and cross-sector, with an emphasis on the Europe, Middle East, India and Africa (EMEIA) market. Marks played a leading role in EY's legal managed services team in EMEIA for financial services and has worked closely with numerous technology partners in delivering solutions to clients, including the firm's IBOR proposition.

Peter Scott, managing partner for Norton Rose Fulbright, Europe, Middle East and Asia, commented: "It's great to welcome Alex and Daniel as we continue to make strategic investments in new capabilities to meet our clients' evolving needs through NRF Transform. Alex and Daniel have outstanding experience and they will enable us to extend the breadth of our offering to our clients through combined advisory, legal and managed services capabilities."



FTI Consulting's Technology segment has appointed Stuart Craft as a managing director in its E-Discovery Consulting & Services practice in Europe, the Middle East and Africa ("EMEA").

Craft, who is based in London, was previously technical director at Anexsys, a U.K.-based litigation support firm. He specialises in handling a wide range of data types and ensuring they are collected, processed, reviewed and produced in an accurate, clear and defensible manner.

"We've seen unprecedented growth in demand for our e-discovery practice over the last year, as organisations grapple with a steady uptick in the frequency and scope of disputes and investigations, alongside new challenges relating to emerging data sources," said Jon Chan, a senior managing director within FTI Technology's E-Discovery

Consulting & Services practice in EMEA. "Our team of e-discovery, emerging data and analytics experts are at the forefront of developing solutions that provide clients with rapid insight into their data and the most efficient resolution possible for their matters. Stuart brings exceptional software development and e-discovery experience to our team and we welcome his innovation and expertise as our practice continues to expand."

David Lish has taken over as head of IT at Fieldfisher, which has completed its migration from Skype to Microsoft Teams, supported by global systems integrator Cision.

Lish was previously head of IT service delivery at the UK top 50 law firm, where he has worked for over 18 years.



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# MOVERS AND SHAKERS

## NORTH AMERICA



No-code contract lifecycle management vendor Agiloft has hired Kerry Desberg as its new chief marketing officer, replacing Hiro Notaney, who is now CMO at SirionLabs.

Desberg joins Agiloft from SaaS partner relationship management provider Impartner

Software. She has over 30 years of experience in B2B and B2C marketing with some of the world's top Fortune 500 corporations and agencies, including Procter & Gamble, Owens Corning, Danaher, Lockheed Martin, and Fleishman Hillard.

Desberg is the latest senior hire by Agiloft, which in February announced the arrival of Jim Leason, formerly a VP at Thomson Reuters, as its managing director of EMEA. In September, it welcomed Angel Lange as VP of finance; Anne McNulty as senior director of AI success; and Dan Mosera as senior vice president of strategic accounts.

Agiloft in 2020 took on growth equity investment of \$45m, following the hire of CEO Eric Laughlin, who joined from EY.



London-founded legal tech consultancy Pinnacle has promoted Val Reece to become its first US chief operating officer, in a move designed to help it accelerate its ambitious US growth.

Reece joined in February as director of client services and was already helping to lead the structured growth of Pinnacle's North American team across consulting, software, and managed services. Her promotion comes as Pinnacle sees growing demand for business consulting and implementation services across Elite 3E and Intapp portfolios. Her hire and subsequent promotion follows the departure in January of US CEO Bob Beach, who was also previously a director at Thomson Reuters.

David Lumsden, CEO of Pinnacle, said: "We're ambitious and this drive has had a significant impact on the UK market. Now it's time we do the same for the US, which is exactly where Val comes in."



Baretz+Brunelle has added a new chief digital officer, Josh Anisfeld, to lead its growing digital team. Anisfeld joins Baretz+Brunelle from Heidrick & Struggles, the international executive search firm, where he was the head of digital marketing and the originator of its digital marketing function.

"Baretz+Brunelle was early to recognize the importance of digital marketing to legal service providers, and we are continuing to invest in our leadership position with Josh, who brings more than 15 years of experience in digital communications," said Spencer Baretz, co-founder of Baretz+Brunelle. "Josh understands not only

how to introduce professional services firms to the power of digital marketing, but also how to take forward-thinking clients with active digital marketing efforts to another level."

As chief digital officer at Baretz+Brunelle, Anisfeld will oversee its digital marketing services, working with law firms and other clients to develop digital marketing campaigns that directly support their business goals.

Litigation support vendor Case Works in May announced the appointment of Kim Anderson as CEO and board member.



Anderson, who has a track record growing early stage fintech and specialty finance firms, will immediately assume full operating oversight and responsibility. Susan Barfield, founder, will remain as board chair.

Anderson's leadership experience includes prior operating executive assignments for Vector Capital, C9 Partners, Equifax, Deluxe Corp and FIS. He was most recently CEO for Longitude Partners, Inc and continues as an advisor to a number of private equity firms and other investors.

"I am truly excited about adding Kim Anderson's leadership and guidance to the organization at this pivotal time in our growth" said Barfield. "Case Works has become the nationally recognized provider of high-quality case development services for mass tort and personal injury law firms. In addition to his experience driving growth for early-stage firms, Kim's background with private equity and the institutional investment community is a significant asset as we accelerate our expansion."

Veralocity - a woman-owned professional services company supporting corporate legal departments and law firms - in May announced its managed services now include information governance support related to eDiscovery, with the arrival of industry veteran Tito Adeyemi.



Adeyemi has joined as vice president of solutions architecture and will lead this offering to provide consultation further upstream in the discovery process.

"Information governance is recognized as a critical step of the discovery process, with its importance emphasized in the most current Electronic Discovery Reference Model. The continued increase in data creation and storage requires organizations to focus on IG to reduce risk and better prepare for litigation and investigations," says Veralocity CEO Dan Panitz. "We're thrilled to have Tito Adeyemi on the Veralocity team. Her expertise and consultative approach in helping corporations address governance issues related to discovery are a perfect fit for our managed services programs."

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## ACQUISITIONS AND INVESTMENT UK AND EMEA

London-founded digital onboarding and KYC start-up Legl has closed an \$18m Series B funding round, which it says will help fuel the next phase of product expansion and development. The Series B was led by existing investor Octopus Ventures and includes other unnamed investors.

Legl combines the automation of manual business processes for regulated law firms, like compliance, risk, onboarding and payment, with a lightweight CRM and flexible, no-code workflows. It enables law firms to better manage cash flow and mitigate risk, through better understanding client data and managing the entire client lifecycle.

Legl says that its customers now include 20 of the top 200 law firms, one of which is Brachers in Kent. Its customers listed on its website are typically small law firms, including Sidcup-based conveyancing firm RG Law; Douglas-Jones Mercer in Swansea; and Streeter Marshall in Croydon, Purley and Warlingham.

This funding round comes just over a year after Legl raised a \$7m Series A.

Julia Salasky, founder and CEO, said, "By focusing on the business processes of law firms, which are complex, regulated businesses, Legl is able to enable law firms to focus on what they do best – law. We're thrilled to close this funding round which, alongside our brilliant investors and their expertise, networks and understanding of the market, will drive growth and impact for us and for our clients."

France-founded SaaS corporate governance and contract management provider DiliTrust has raised €130m from a consortium of investors including Cathay Capital, Eurazeo and Sagard, which it says will help it to expand into new markets.

DiliTrust works with over 2,000 legal departments of large and mid-sized corporations. With the money raised, it plans to grow both organically and through acquisitions, in order to achieve international expansion. It also plans to carry out a significant recruitment initiative over the next twelve months. The company currently employs around 170 staff worldwide and turned over nearly €20m in 2021, half of which was generated internationally. It has a recorded annual growth of more than 30% in recent years.

Its clients include Royal Bank of Canada, BNP Paribas, Campari, Capgemini, and Société Générale, who have turned to the modular DiliTrust Governance Suite for digitising and managing board and committee meetings; managing legal entities; contract management; litigation management; and secure document sharing and collaboration.

“This investment is a recognition of DiliTrust’s performance and reinforces its ambition to be the leader in solutions for legal departments thanks to its unique positioning,” said Yves Garagnon, CEO of DiliTrust. “We work closely with corporate lawyers to anticipate their needs. We offer them the means to make a difference and efficiently manage key data required to make informed decisions.”

## ACQUISITIONS AND INVESTMENT

### APAC

Melbourne-founded legal tech start-up LawAdvisor Ventures has raised USD\$5m of investment in a seed round involving heavyweight investors from the likes of Microsoft and Gilead Sciences, as well as Google Maps founder Lars Rasmussen.

The capital injection includes investment from Ralph Baxter, former chairman and CEO of Orrick; Ben Davey, former CEO of Barclays Ventures; Jason Barnwell, general manager and associate general counsel at Microsoft; and Gary Tully, head of legal operations at Gilead, and Rasmussen. The full list is below.

LawAdvisor was founded in 2015 by CEO Brennan Ong, with investment from Rasmussen. It started out with the aim to provide access to high-quality, affordable lawyers online, but has subsequently launched SaaS collaboration and practice management solutions LegalEye and Fibonacci. These solutions – whose development was informed by a steering group of leading legal teams – are designed to transform how law firms work with corporate in-house legal departments and the way legal matters are managed.

It launched in the UK in 2017 and secured financial backing from legal management consultancy Janders Dean, taking investment at that time to just over AUS\$1m.

Developed by remote teams and launched during the height of the coronavirus pandemic, LegalEye and Fibonacci are already gaining significant market traction – with the company achieving annual recurring license revenues in excess of \$2 million on their release, and early multinational clients including Bird & Bird, Simmons & Simmons, Paul Hastings, Clifford Chance, Shearman & Sterling, and Barclays.

As a result of this early traction, LawAdvisor opened up a strategic investment round to accelerate efforts to use its technology to solve the challenges the legal profession is facing.

Baxter, who since leaving his role as chairman and CEO of Orrick has engaged with a number of successful legal technology companies, sitting on boards of Intapp, Lex Machina, and LegalZoom, said: “We’re at a pivotal moment for legal technology. To make a difference, legal tech companies must understand the pain points facing lawyers and their clients, and fashion solutions that meaningfully address them; LawAdvisor does just that, making it an exceptional new contributor to the legal services ecosystem. Led by a remarkable team, LawAdvisor has the potential to change the way legal service is delivered, for the benefit of everyone.”

The investors in full are:

#### **Ralph Baxter**

Former chairman and CEO of Orrick, Founder of the Law Firm Leaders Forum, and named by the American Lawyer as one of the ‘Top 50 Big Law Innovators of the Last 50 Years’

**Jason Barnwell**

General Manager and Associate General Counsel at Microsoft

**Ben Davey**

CSO of Azerion Group N.V. Previously Chief Investment Officer at EFIC1 and former CEO and Founder of Barclays Ventures.

**Gary Tully**

Head of Legal Operations at Gilead Sciences (Winner of Corporate Counsel's 2021 LegalOps team of the Year)

**Lars Rasmussen**

Founder of Google Maps and former Engineering Director at Facebook

The investors will form a new advisory panel aimed at helping LawAdvisor further develop its technology and expand its market, from the small in-house legal team to the multinational law firm.

The advisory panel is being joined by:

**Steve Albrecht**

General Counsel at Barclays Execution Services

**Christopher Grant**

Consultant and LawTech UK Panel Member

**Stephanie Hamon**

Head of Legal Operations Consulting, Norton Rose Fulbright

**David Kerr**

Former CEO, Bird & Bird.



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# ACQUISITIONS AND INVESTMENT NORTH AMERICA

No-code contract lifecycle management vendor Evisort has raised \$100m in capital, including equity and venture debt financing. This latest round of funding is led by global growth investor TCV, a key investor in Airbnb, LinkedIn, Netflix, and other major-name success stories. TCV general partner Amol Helekar will join the Evisort board of directors. This financing round includes participation by Breyer Capital and all major existing investors, including General Atlantic, Microsoft's venture capital fund M12, Amity Ventures, and Vertex Ventures

"Every time an organization buys, sells, hires, or otherwise transacts, it creates a contractual data layer. We created Evisort because it is absolutely critical for organizations to easily access and manage this data inside their contracts. We couldn't be more grateful for the trust of our hundreds of customers to build this innovative technology with us," said Evisort co-founder and CEO Jerry Ting. "Now, we will accelerate this momentum as these additional funds will supplement our existing capital to further our vision for making contract operations stronger and more meaningful than ever."

The company says it will use the funds to enhance the customer experience, continue to invest in its product, and accelerate global growth. The announcement follows recent key executive hires, including Michaela Dempsey of Workday as chief marketing officer, Steve Tucker of DocuSign as chief sales officer, and Dwight Krossa of Knowable as vice president of product.

"At TCV, we are excited about our investment in Evisort. We believe Evisort's proven AI platform solves increasingly important pain points for many businesses – to extract value from contract data, streamline the contracting process, and improve the efficiency of legal operations," said Helekar "Contracts are core to many critical functional areas such as legal, sales, and procurement. The fact that Fortune 500 customers and mid-sized businesses alike can implement and realize value with Evisort across business functions in less than a month underscores the platform's usability across industries and use cases."

Evisort's customers include Bank of New York Mellon, Jelly Belly, Keller Williams, Microsoft, Motley Fool, NetApp, Otsuka Pharmaceutical and Vonage.

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SirionLabs in May announced a fresh round of \$85m in Series D funding led by Partners Group, a leading global private markets firm, with participation from existing investors Avatar Capital, Sequoia Capital and Tiger Global.

This brings the total raised by SirionLabs to \$157 million – a significant milestone for the company since it was founded in 2012 by entrepreneurs Ajay Agrawal, Kanti Prabha, Aditya Gupta and Claude Marais as it more than doubles the company's capitalization. The investment will enable SirionLabs to continue expanding its leadership position in the rapidly growing enterprise CLM market, which is projected to reach \$3.3 billion by 2027.

"The two biggest challenges in CLM are aligning post-award performance with contract terms and automating the import of legacy documents using AI," said Ajay Agrawal, Co-founder and CEO of SirionLabs. "The SirionOne platform has a compelling technology advantage in both of these areas. This capital allows us to seize the moment, accelerate product innovation and bring our award-winning solution to an increasing number of enterprise customers."

The funding from Partners Group will support scaling SirionLabs' operations, which includes adding up to 200 employees to its global workforce. Key emphasis will be placed on product innovation in AI and user experience (UX) that will attract new customers while also better serving the SirionLabs current customer base of more than 250 companies.

"We are delighted to lead this fundraising round for SirionLabs and have strong conviction in the company's future growth potential," said Cyrus Driver, managing director of private equity, technology at Partners Group, who will join the SirionLabs board of directors. "The addressable market for CLM is expanding rapidly as more organizations undertake digital transformation initiatives. We were attracted by SirionLabs' leadership in this category, superior product offering, and blue-chip client base, and look forward to working with management on increasing scale-up capacity."

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LexisNexis Legal & Professional has acquired contract lifecycle management vendor Parley Pro, which will form part of LexisNexis' enterprise legal management (ELM) platform CounselLink.

Founded in 2015, Parley Pro provides an end-to-end contract process automation offering from contract request, drafting, negotiation, signature, and post-signature management.

"Parley Pro's CLM capabilities provide the critical third pillar—in addition to Legal Spend and Matter Management—to strengthen our already robust CounselLink platform," said Sean Fitzpatrick, CEO, LexisNexis UK and North America. "Together, CounselLink and Parley Pro will deliver greater overall value to ELM customers seeking CLM solutions by enabling more effective negotiation workflows and providing the right contextual insights to inform better decisions and create value for the organization."

"We're excited to join the LexisNexis team," said Olga V. Mack, CEO of Parley Pro. "By seamlessly integrating Parley Pro's best-in-class contract automation and workflow tools with CounselLink's market-leading features, innovation and capabilities, customers will benefit from the industry's all-in-one, premier legal operations platform."

Parley Pro's current leadership team will continue leading the Parley Pro business and will be supported by and will collaborate closely with the CounselLink and broader LexisNexis Legal and Professional teams.

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Business process automation provider Kofax in May entered an agreement to be acquired by Clearlake Capital Group and TA Associates from incumbent software investment owner Thoma Bravo. Clearlake was an investor for four years in NetDocuments, selling its stake to Warburg Pincus in 2021.

Founded in 1985, Kofax was acquired by Thoma Bravo in 2017 from Lexmark Enterprise Software, combining Lexmark's Kofax and ReadSoft businesses under one brand. In 2018 it acquired Nuance's document imaging division to expand into the legal marketplace. Kofax last month agreed a deal to acquire London-based electronic invoicing company Tungsten Corp for £53.7m.

"Clearlake and TA offer industry knowledge and experience scaling enterprise software companies like ours," said Reynolds C. Bish, CEO of Kofax. "These resources will be critical as we strive to further grow the company and bring added value to our customer base, with a focus on developing and expanding our product portfolio."

Kirkland & Ellis and Sidley Austin provided legal counsel to TA and Clearlake. Kirkland & Ellis also provided legal counsel to Thoma Bravo. Terms of the deal have not been disclosed.

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Killer Whale Strategies – the investment vehicle of legal tech columnist-turned-founder Zach Abramowitz – has invested a five-figure sum in London-based capital markets startup 10BE5, which was founded by Cleary Gottlieb Steen & Hamilton attorneys John Kwan and Mohamed Taha.

10BE5 uses natural language processing technology to automate the drafting of capital markets disclosures and related processes. It received minority investment from Cleary in 2021 and Taha continues to work at the white shoe, New York-headquartered law firm.

While Kwan and Taha are based in London, the name 10BE5 stems from the disclosure standards required by Rule 10b-5 under the US Exchange Act of 1934, and also pertains to the ambition to cut lawyers time spent on disclosure in half (aka 10 to 5 hours).

Announcing the investment today (3 May), Abramowitz says: "Any attorney who has ever worked in capital markets knows the amount of repetitive, mind-numbing work that goes into drafting disclosures whether it is the financial trends in the MD&A, the risk factors or the circle-up process. 10BE5 removes tedious, anxiety-inducing work for capital markets attorneys. You can use their software OR you can outsource the work to their team and get it back completed."

He adds: "10BE5 is already working with the biggest firms in the world, and I am betting that in-house departments will begin using it themselves. I have long suspected that someone would design a product for capital markets attorneys. But, I also knew the amount of legal expertise required to build this product, so it had to be the right founders. I am confident betting on John and Mohamed."

Other startups that Killer Whale has invested in include LegalMation, which helps to automate routine litigation tasks.

# NEW PRODUCT RELEASES

## UK AND EMEA

Peppermint Technology has built a task management application which identifies the best person for a case, matter, or general task, based on integrated personnel data.

Work Management uses intelligent, automated analysis of staff workloads, employee competencies, experience, expertise and working patterns to provide a solution to address the resource allocation challenges faced by law firms today.

Rich Mephan, director of research & innovation at Peppermint said: “Modern law firms need a holistic view of the capabilities and availability of their team to ensure cases, matters, and wider tasks are managed fairly, efficiently, and effectively. Peppermint Work Management is an application which allocates the best person to complete a task to the highest standard with the least delay. But what’s perhaps most exciting about this app is how quickly we can get law firms up and running – we’re talking weeks to realise time to value.”

The new solution is expected to also derive benefits in terms of more equitable management practices. The binary approach to deciding how the ‘best person for the job’ is identified, how top performers are rewarded, and how those who need additional help or training are flagged, provides great promise for the reduction of unconscious bias in law firms.

Charlotte Love, product manager at Peppermint said: “We see Work Management as a tool that can make a real impact on how law firms work. The processes surrounding how tasks and cases are allocated has long been a source of friction in law firms – whether it concerns which team gets a big case, who the photocopying is delegated to and how top performers are compensated. By leveraging the power of intelligent analysis in a single Microsoft platform, Work Management offers a data-first approach to allocation based on skills, expertise, and availability. This presents a great opportunity for law firms to not only increase productivity, but also remove the risk of bias in how cases are distributed in large legal teams.”

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Relativity Fest London went off without a hitch in May, with announcements of several new product capabilities in its Microsoft Azure-hosted eDiscovery platform RelativityOne.

Later this year Relativity will incorporate AI machine translation directly in RelativityOne. We’re told that out-of-the-box, users will be able to translate large batches of documents in more than 100 languages and 12,000 language combinations. Relativity is integrating Microsoft Translator Text API, part of Microsoft Cognitive Services, which returns some of the highest quality machine translation results in the original format of the document. An early access trial with select groups will kick off this month and will be refined for general availability later this year.

“Today, we struggle with the speed of third parties turning around translations,” said Raju Patel, associate director, digital forensic group at Grant Thornton. “Integrated machine translation will be well used by our team given the opportunity to save all this time and improve our efficiencies.”

On average, each RelativityOne customer using Automated Workflows has saved 164 hours and 5,780 clicks in just the past six months, we’re told. To help further increase efficiency, Relativity is introducing parallel execution which will allow users to run multiple actions at the same level in their workflow at the same time. Additionally, Relativity will introduce a “Copy to Workspaces” feature, allowing users to easily create copies of their workflow across one or more workspaces. Soon, Relativity will also create opportunities for even more innovation by adding APIs for Automated Workflows that will enable users to build their own actions and triggers.

Meanwhile, an AI-powered sentiment analysis feature will be available to RelativityOne users later this year. Sentiment analysis will allow users to identify positive and negative sentiment in their data. The analysis is conducted on a sentence-by-sentence basis so that even if negative sentiment is buried within a longer conversation, users will not miss that key information.

“Sentiment Analysis enables us to look at our data from a new perspective, helps prioritize our review, and allows our teams to make smarter and more strategic decisions,” said Michallyn Demiter, eDiscovery expert at Bayer. “Currently, we’re using sentiment analysis on a few of our internal investigations, but we’re already seeing the value and look forward to expanding use across other areas of the business.”

RelativityOne’s application for collecting documents from the likes of Google Workspace (Collect) is being extended. Later this year, Relativity will add iManage, SharePoint, Smarsh and Enterprise Vault (for Relativity Trace) to its list of platforms users can collect data from.

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ThoughtRiver in May announced the development of a tool tailored to reviewing construction and engineering agreements. The ThoughtRiver platform is already being used by leading law firm Shoosmiths LLP, Engineering Consultancy Hoare Lea (part of the Tetra Tech Group) and engineering giant Schindler.

ThoughtRiver's contract acceleration platform uses AI to generate a checklist of key risks and recommended actions in moments and analyses large portfolios of contracts. It is used by multinationals across the globe including Schindler, DB Schenker and 3 of the 'big 4' accountancy firms. This latest development is the first time ThoughtRiver has turned its attention to developing a specific solution for the construction and engineering industry.

"Developing tailored, industry-focused solutions has always been ThoughtRiver's approach.", Says Tim Pullan, CEO and Founder of ThoughtRiver. "When speaking with construction lawyers it quickly became apparent that our unique technology and content can offer significant benefits when applied to the review of construction and engineering agreements. There is such an obvious synergy between what the industry needs in terms of contracting consistency, cost savings and portfolio risk visibility, and the capabilities we can offer. We are delighted that we've been able to develop a much-needed tool that is also a market first."

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Technology law firm Scott & Scott has built an integration between its contract management solution and ConnectWise Sell, which is automated quote and proposal software for the IT services industry.

Scott & Scott offers a cloud-based contracts-as-a-service solution for managed service providers, allowing MSPs to deploy customized versions of its master legal templates for online review and acceptance by end users. Using the order porter and quote templates within ConnectWise Sell, MSPs can collect e-signatures, enter into click-wrap agreements, and obtain browser wrap consent from clients for the online terms and conditions provided by the firm.

ConnectWise and MSP consulting firm FocusPlanit is working with Scott & Scott to get the legal agreements the firm has created for its MSP clients integrated with ConnectWise Sell's quoting software.

"Scott & Scott is providing the contract management solution and we are effectively helping clients implement it using Sell," according to Calvin Johnson, director of sales and marketing at FocusPlanit. "Since the MSPs we work with on a daily basis aren't attorneys and are just trying to take care of their businesses, they need the legal aspect to be out of sight and out of mind. We want to provide any help we can to do that."

The first stand-alone LTC4 Core Competency Learning Plan content has been delivered by legal IT training specialists, iTrain Legal and is now available on the Novum Learning platform. LTC4's alliance with Novum Learning was announced in 2021, when it was acknowledged that a critical core competency discipline for the legal sector is managing documents & emails. This forms the basis of the first learning plan, which is available free of charge until 30 June 2022.

"Tens of thousands of smaller firms and individuals do not have the same resources as the large law firms. However, there is still a requirement within the legal services industry for personnel to upskill, particularly within ever-changing technology and the evolving demands of law firm clients," said Bonnie Beuth, chair of LTC4.

"Our content, based on the industry-leading iManage Work 10 system, will assist smaller firms to get the most from their technology, and individuals to invest in learning which can be applied for the rest of their career," added Dorigen Sykes, managing director of iTrain Legal.

Through this initiative, both organizations aim to address knowledge gaps and provide professionals with certification of competence on the core technology skills needed within the profession.

## NEW PRODUCT RELEASES NORTH AMERICA

Mayer Brown, Factor and derivatives risk management services provider Acadia have launched 'CAN Comply' – a flat-fee service for the review and certification of compliance of derivatives executed under the European Market Infrastructure Regulation (EMIR).

Mayer Brown, which is an Am Law top 20 firm; and Factor, which provides legal managed services, are working with Acadia on its agreement manager platform. To date, this work, which is often costly and time consuming, has typically been absorbed by a combination of outside counsel and existing in-house departments, resulting in increased costs and difficult workloads.

"Regulations contribute to the growing avalanche of workloads facing in-house departments. By integrating our respective strengths, we've created a client-centric service that enables robust compliance without excess burden or cost," said Chris DeConti, Factor's head of strategy.

Clients simply identify the counterparty relationships they would like analysed and all relevant information is shared via the secure digital Acadia Agreement Manager platform. Factor and Mayer Brown analyze the data provided, perform cross-validation checks, and provide a certificate that the client can present demonstrating compliance, with ongoing annual checks to confirm continued compliance available too.

"Clients have been so focussed on the implementation aspect of initial margin, it would be easy to overlook some of EMIR's ongoing obligations," said Edmund Parker, partner and global head of derivatives at Mayer Brown. "With a simple, minimum fuss, data extraction model, our combined offering elegantly solves this problem."

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Thomson Reuters is launching Legal Tracker Advanced for spend management, mapped against the tags of SALI's Legal Matter Standard Specification (LMSS). SALI stands for the Standards Advancement for the Legal Industry (SALI) Alliance. In March, it announced the official release of LMSS 2.0. incorporating almost 10,000 tags that the legal market uses to describe its services in detail, in a way that is comparable across organisations, to facilitate pricing and data science initiatives.

Mapping Legal Tracker Advanced to SALI's industry-wide taxonomy/ontology reinforces, Thomson Reuters says, its commitment to being open and allowing law departments to easily connect and integrate solutions.

"The office of the general counsel, like many professional services departments, is challenged with doing a lot more with a lot less, while struggling to attract and retain the next generation of talent who want more engaging, less administrative tasks," said Sunil Pandita, president of the corporates business segment at Thomson Reuters. "Leveraging the power of our partners and Thomson Reuters world-class content-driven technology, Legal Tracker Advanced is now an even more powerful way for legal departments to empower their teams to control costs and increase efficiency with data-backed information and recommendations on outside counsel spending, freeing up time for the department to focus on high-impact, business-critical work."

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Integreon, a trusted global managed services and alternative legal services provider (ALSP), announced today at the CLOC Global Institute expansion of its contracts management capabilities to include Legal Operations as a Service, Contract Lifecycle Management (CLM) Platform Support, Contract Performance Management, and an upgraded data extraction, migration and abstraction center of expertise, all built to deliver measurable business value at compelling price points.

Integreon is a sponsor at the annual CLOC Global Institute in Las Vegas and several of its subject matter experts including Gabriel Buigas, Sylvain Magdinier, Ian Connerty, and Patricia Callejon will be on site and available at Booth 236.

Highlights from the new portfolio include:

**Legal Operations as a Service** - Corporate Legal Operations teams are straining to meet unprecedented demand for their support: helping in-house departments do more with less, project managing complex innovation and technology programs while delivering enhanced operational analytics to their leadership. Integreon combines legal operations resourcing and delivery expertise with UpLevel Ops' consulting capabilities into a complete, cost-effective Legal Ops solution that covers strategic and advisory services, day-to-day operational support, financial, budget and vendor management.

**CLM Platform Management** - Organizations make a significant investment in contract lifecycle management (CLM) platforms, but many implementations fail to deliver the expected return on that investment due to insufficient post-rollout support. Integreon provides comprehensive CLM platform management designed to achieve expected ROI, offering system deployment support and monitoring, contract repository maintenance, reporting / analytics, as well as helpdesk services and training. Integreon's team of Six Sigma black belts and change management experts analyze client operational processes and surface optimization opportunities to maximize efficiency.

**Contract Performance Management** - Expensive commercial disputes and contract value leakage all happen after the deal is signed. Many businesses lack the resourcing to fully manage contract risks post-execution, resulting in service defaults and financial under-performance. Contract renewals, extensions, change requests and in-life deal negotiations are all expertly supported by experienced Performance Management associates. Integreon also deploys AI technology to ringfence contract obligations data, and then tracks, monitors and reports these obligations to help clients ensure that their contracts deliver the expected business outcomes.

**Data Extraction and Migration** - A commercial contracts estate is hazy and unstructured until the contract data has been properly extracted and organized. Migrating the estate from one IT repository to another can be an operational nightmare for clients, when it could be an opportunity to master the information. Integreon has built a Center of Excellence uniquely focused on data extraction and migration, with a team of highly experienced contract and technology professionals assisting corporate clients with their contracts data transformation programs. With delivery centers on three continents, Integreon provides a global service supporting over 50 languages.

"Integreon is excited to offer a targeted suite of offerings intended to enable the legal ops community to effectively execute on their key strategies and objectives, said Gabriel Buigas, Executive Vice President and head of Integreon's Contracts, Compliance and Commercial Services (CCC). "As a former in-house legal executive, I understand the challenges being faced by legal operations leaders given the ever growing demands being placed on the legal function and we are proud to offer services that can help them be successful."

US web-based legal practice management software vendor MyCase has launched desktop document management solution MyCaseDrive, which automatically syncs documents between desktop and MyCase.

All documents are automatically backed-up in the cloud and synced between desktops and MyCase, removing the need to upload or download files in different locations. According to MyCase, Drive is the ideal replacement for law firms using Dropbox, and includes unlimited storage.

Users can save or drag and drop files directly to a case folder and organize those case folders by client, practice area, or stage. MyCase customer and family law attorney Jennifer Joyce Tompkins, whose law offices are of that name, is quoted as saying: "On a weekly basis, we probably save 6-8 hours using MyCase Drive."

MyCase Drive will be added to the Advanced pricing plan to accommodate the growing needs of MyCase customers.

"MyCase is continually innovating and honing its tools to make matter and document management even easier and more efficient for law firms," said Jim McGinnis, CEO of MyCase. "We leveraged customer feedback and learned that streamlined document management is essential for law firms. In response, we developed MyCase Drive, an all-encompassing, seamless document management solution."

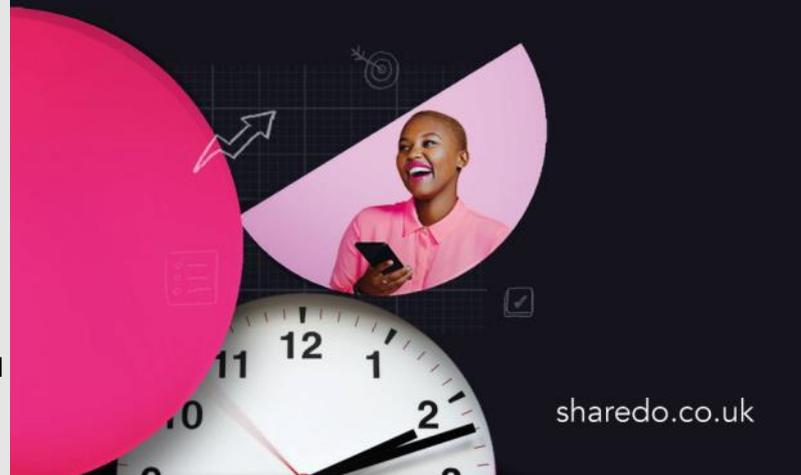
The announcement comes as MyCase prepares to roll out legal accounting, following the acquisition of Soluno in November 2021. The company also in November announced the acquisition of practice management system for personal injury firms, CASEpeer and legal document automation provider Woodpecker.

MyCase was acquired by leading private equity investor Apax Partners in 2020.



# WE HELP LAWYERS, ACHIEVE SUPERHUMAN RESULTS

Sharedo is a legal case management platform that enables practice groups to achieve superhuman results. Driven by our proprietary P3 engine, Sharedo helps predict service improvements, turbocharge your team's performance and make your business more profitable.



## NEW PRODUCT RELEASES APAC

Relativity in May announced that its secure, end-to-end SaaS platform RelativityOne is now offered in Japan.

Relativity's proactive approach to availability includes complete deployment of RelativityOne in Japan, providing a powerful and secure framework for its global customers to deliver a unified experience anywhere in the world and ensure compliance with local standards.

"Extending RelativityOne's footprint to Japan is significant for our customers and a major milestone for our APAC team," said Georgia Foster, Senior Managing Director of APAC at Relativity. "Over the last few years, we've made a strong push to build out availability in APAC, which now accounts for 40 percent of the geographies where RelativityOne is available. I look forward to our continued momentum as we transcend borders and increase global accessibility to our cloud platform."

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