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listings
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NEW FOR 2018

Fully updated and expanded

The In-House Counsel's

LEGAL

TECH ²⁰₁₈

Buyer's Guide

{LawGeex}

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FOREWORD BY LUCY BASSLI

The legal technology space has exploded, bringing unprecedented disruption to the [\\$600 billion global legal services market](#). Each month dozens of companies burst onto the scene promising to transform daily legal tasks, and the pace of transformation is only accelerating. Funding of companies has increased. Consolidation and acquisitions are continuing. Meanwhile, adoption of the latest technology among in-house lawyers has become mainstream.

The In-House Counsel's Legal Tech Buyer's Guide 2018 reflects these major developments.

The fully updated and revised guide features 16 categories of legal technology, from contract drafting, eDiscovery, and digital signature, to prediction and litigation technology. The guide includes interviews with the world's leading in-house teams, legal experts, and the latest research on the market, but remains focused on what this means for the in-house legal buyer in 2018.

Speaking every day to law departments and selecting legal technology during my time at Microsoft, I found that this rapidly-changing landscape, while exciting, can pose challenges. Even sophisticated buyers continue to be overwhelmed by the choices when buying legal technology. The confusion is further exacerbated when buzzwords such as *AI*, *blockchain*, and *the cloud* are used.

That is where this guide comes in. It outlines advances in software that save law departments time and money, allowing us to focus on more strategic tasks. It demystifies buzzwords and provides practical recommendations from in-house teams who have been through the process of buying new technology.

The greatest and most far-reaching change I have experienced is how legal technology is making inroads into the “front office”, taking over tasks or initial steps of the actual legal work that has traditionally been handled by lawyers or legal staff. For the first time, everyday tasks—such as analyzing or reviewing contracts and researching legal issues for case law and regulatory insights—are increasingly becoming automated, at least in stages.

There is no doubt that legal tech is here to stay and will change the face of lawyering as demonstrated by the practical examples and testimonials in this book. The guide includes the experiences of companies such as Google, Microsoft, Facebook, McDonald’s, NetApp, and many others slashing time and money, and achieving superior legal service delivery.

We hope this updated guide provides a useful starting point and insights for the assessment of your legal tech needs.



Lucy Bassli

Lucy Bassli, former Assistant General Counsel at Microsoft and Chief Legal Strategist at LawGeex

INTRODUCTION

This guide tackles 16 technology categories for in-house lawyers and legal departments, from contract drafting to legal research, communications, matter management, e-discovery, and digital signature platforms. It also includes major new categories this year, including online training and a section of general useful technologies for in-house lawyers.

The book will also explain some key issues. What are the legal risks in using technology? How do I get a budget? How do I measure Return on Investment (ROI)? What organizational challenges will I face?

We highlight challenges as well as success stories of legal teams that have been at the vanguard of adopting new technologies.

We value any feedback or suggestions.

[Please contact us at hello@lawgeex.com.](mailto:hello@lawgeex.com)

NOTE ON METHODOLOGY

One of the central messages of this guide is that there is no need to reinvent the wheel when given a daily legal task. We have relied on dozens of original interviews and the large body of online information about the growing legal tech landscape. A complete list of our resources is at the back of this book.

In each legal tech category featured in this guide, the top three to five players are given prominence. They are not listed in any particular order and have all received recommendations from in-house counsel. In certain more mature legal tech categories (for instance, e-signature solutions or contract management), we also include other top products, rounding out the category.

As this is a guide for in-house legal teams, we have selected technology that is being marketed to legal departments rather than law firms. Each section also includes a pricing guide. Pricing is based on a comparison of competing products within a category based on publicly listed information. That ranges from free to gradually more expensive offerings (represented as \$, \$\$, and \$\$\$). We also indicate when no publicly available pricing is available.

We hope that in-house counsel will find solutions in these pages that will help them identify efficiencies, increase effectiveness, and grow value within their corporation, ultimately enhancing their role and professional success.

THE CASE FOR LEGAL TECHNOLOGY ADOPTION

The In-House Counsel's Legal Tech Buyer's Guide 2018 is published as legal teams face unprecedented pressures, reinforced by multiple surveys of in-house legal departments in the past 12 months. The upheavals facing in-house teams are well known, but worth repeating briefly.

- **Cost pressures are rampant.** Cost pressures to improve efficiency are cited by **69% of General Counsel** as a driving force in their daily roles. Businesses want to pay less for legal services but there is no reduction in work. Only **28% of legal departments are hiring**, yet **82% of departments expect their legal needs to increase in the next year.**
- **The need for more strategic lawyering.** In the new business environment, in-house lawyers are required to demonstrate greater strategic alignment of their business goals, with **65% of in-house counsel now saying they take part in strategic business decisions.** However, the journey toward having a seat at the leadership table is not complete. The results of a survey of board directors indicate that while GCs achieve an **80% satisfaction rate from the C-Suite on compliance matters**, and as trusted advisors (**75% approval**), they fare less well in maximizing value (**47% approval**), leveraging technology

(27% approval), and empowering the wider business through training or self-service tools (19%). The wider business considers the use of technology as a significant means to allow lawyers to deliver a more strategic and collaborative approach.

- **Reduction in law firm costs.** In-house teams now handle approximately [75% of their legal work](#). In the words of [Connie Brenton](#), Director of Legal Operations at NetApp and President of the Corporate Legal Operations Consortium: “Law firms are starting to see work go away. Bread and butter work is going away because of tech and other external providers.”
- **The growth of Legal Operations.** Legal Operations (capitalizing second second reference), a movement to ensure that law departments function as a business, have become entrenched, as [56% of legal departments now have a dedicated legal operations function](#), up from 51% last year. The greater use of automation for everyday tasks is a key part of the legal operations remit, alongside better processes in general.

These are just some of the factors at play that have caused a rapid adoption of legal technology. Overall, law departments’ spending on systems and technology has grown at a [25% faster rate than the larger corporate market](#) in the past year alone.

KEY LEGAL TECH TRENDS

AI: From Buzzword to Bulwark

Artificial Intelligence (AI) is a system that learns to perform intelligent tasks we usually think only humans can do. The rapid adoption of AI for in-house legal counsel reflects the appetite for lawyers to automate processes and devote more time to more valuable (and interesting) work. Seventy-one percent of law departments [cite the need to increase productivity without increasing headcount](#) as their main driver for AI adoption. In his book *Tomorrow's Lawyers: An Introduction to Your Future*, Richard Susskind writes, AI is disrupting “not just the world of practicing lawyers but also our common perception of the legal process.”



“AI will disrupt not just the world of practicing lawyers but also our common perception of the legal process.”

—Richard Susskind

Below is a visual representation of some of the solutions in this book that use some form of AI. There has been an increase of 65% in legal tech companies utilizing AI compared to our corresponding study last year. That includes a raft of agile and well-funded startups, but a key theme is that established players are also joining the playing field. LexisNexis has offered new AI solutions (*Lexis Answers*), and Bloomberg Law’s AI-driven solution *Points of Law* debuted in 2018, making legal research a particularly tightly contested field among providers.

The current AI applications in legal departments include mining documents in discovery and due diligence, answering routine questions, sifting data to predict outcomes, and drafting and reviewing contracts. In the past year, [studies have further confirmed](#) that AI can be both faster and more accurate than experienced corporate lawyers on everyday legal tasks.

However, as a rule, AI in the legal field is only impressive when it is a means to provide seamless service to customers. In the words of legal commentator [Jordan Furlong](#), the question to ask with any burgeoning technology (AI or not) is whether it helps get what you need done faster and less expensively and whether the same results would have been much more difficult to achieve with existing processes or tools.

Legal AI Landscape 2018



Funding and Consolidation

In the past year, the legal technology space has witnessed a spate of mergers and acquisitions and a record rise in funding. That demonstrates the growing sophistication of the legal technology market. Legal tech in 2017 saw \$233 million in investments in companies across 61 deals, edging ahead of 2016 with \$224 million in [investments across 79 deals](#). Funding for disrupting the legal profession continues to flourish in 2018, as shown in the graphic below. Investment site Crunchbase found that legal tech startups raised \$1.25 million in Q1 2017, [compared to over \\$49 million](#) in just the first month of 2018. Notable consolidations in the past 12 months covered the whole legal technology spectrum. In legal research, Fastcase acquired Docket Alarm, and Ravel was acquired by legal research giant LexisNexis. In litigation management, Integreon bought cloud-based litigation management platform Allegory. In IP, Boston-based Anaqua merged with California-based Lecorpio. In eDiscovery, an established [pattern of consolidation](#) continued. In the contract management space, document management platform iManage's acquisition of the RAVN AI engine has shown significant benefits in integrating AI into a document management system. This year, e-signature leader [DocuSign has filed for an IPO](#), a major indication of the opportunities to transform daily tasks inside corporate legal departments.

BIGGEST LEGALTECH FUNDING IN THE PAST YEAR



BIGGEST LEGALTECH CONSOLIDATIONS IN THE PAST YEAR

Category	Transaction	Company 1	Company 2
eDiscovery	Jul '17 Acquired	OpenText	Guidance Software
	Oct '17 Acquired	DTI	NuLegal
	Jan '17 Acquired	JLL Partners	Xact Data Discovery
	Jun '17 Merged	Congruity360	KNJ
	Feb '18 Acquisition	OpenText	Hightail
	Feb '18 Acquisition	CertaTech	Clearwater Legal
Contract Management	Mar '18 Merged	Consilio	Advanced Discovery
	Apr '18 Merged	Catalyst	Total Discovery
	Jun '17 Acquired	Exari	Adsena
Consumer	May '17 Acquired	iManage	Ravn
	Nov '17 Acquired	NetDocuments	ThreadKM
Litigation	Jan '18 Acquired	Internet Brands	Avvo
	Nov '17 Acquired	Integreon	Allegory
Document Drafting	Feb '18 Acquired	Veritext	David Feldman Worldwide Court Reporting
	Nov '17 Acquired	AbacusNext	HotDocs
Intellectual Property	Jul '17 Merged	Anaqua	Lecorpio
	Aug '17 Acquired	Leonard Green & Partner	CPA Global
Dispute Resolution	Jun '17 Acquired	Tyler Technologies	Modria
	Jun '17 Acquired	LexisNexis	Ravel
Legal and Matter Management	Jan '18 Acquired	Fastcase	Docket Alarm
	Apr '18 Acquired	Mitratesh	ThinkSmart
e-Signature	Dec '17 Acquired	DocuSign	Appuri Inc.

Blockchain

In the words of legal tech blogger and lawyer [Robert Ambrogi](#): “Blockchain is quickly emerging as legal technology’s new black.” Blockchain is new form of database. The [consensus-dependent and encrypted technology](#) could potentially revolutionize many aspects of business, including the law. However, most recognize that blockchain’s applications in the legal sphere remain limited. Rare examples include professional services firm EY, which has launched a new smart contract and blockchain platform for the [insurance sector](#) with a focus on global shipping. This Includes the ability to create and maintain asset data from multiple parties, to link data to policy contracts, and to receive and act upon information that results in a pricing or business change. Insurance giant AXA has also launched [self-executing contracts](#) covering flight delays for consumers. However, according to [Jason Smith](#), Senior Director and Legal Counsel for Apttus: “While blockchain is a very hot topic, I still think it’s got some more runway before we start seeing it truly hit mainstream adoption in legal.”

SaaS and Cloud Computing



As a starting point, we only consider SaaS tools as this allows swift implementation, easy access from any location, and low cost of entry

—Vicky Lockie

Software as a service (or SaaS), built on cloud computing architecture, is a way of delivering applications over the Internet as a service. Instead of installing and maintaining software, you simply access this service via the Internet, freeing yourself from complex software and hardware management. Bob Ambrogi, the legal tech veteran, succinctly answered the question of whether to choose cloud or on-site installation. In short, “[Go cloud.](#)”

Fifty-two percent of all respondents to the [2017 ABA Tech Survey](#) use cloud technology, up from 37 percent the previous year. Cloud technology makes up the lion’s share of software listed in this guide. It allows you and your team to access a platform from anywhere in the world. In most cases, the cloud offers the most advanced security and privacy, adhering to modern compliance standards. Vicky Lockie, former SVP AGC Strategy and Special Initiatives at Pearson, who managed radical legal tech transformation at the education giant says: “As a starting point, we only consider SaaS tools as this allows swift implementation, easy access from any location, low cost of entry with predictable monthly

expenses. It is easy to switch and there is no need for in-house IT or software maintenance support.”

In addition, the best cloud-based companies continuously add product features and enhancements based on user feedback. The subscription element means it is easy to switch or scale up and down, although many solutions require a monthly or annual commitment.

Can Lawyers Use the Cloud?

The American Bar Association (ABA) has put together a chart of the ethics opinions of bar organizations that have looked into whether lawyers can store client files in the cloud. So far, no state has said no. [The Legal Cloud Computing Association](#) (LCCA) has recently [published](#) a set of standards providing additional guidance for how lawyers should handle cloud computing issues.

HOW TO BUY LEGALTECH

There is no easy way to make an important purchase such as legal tech products. Legal tech is spread across almost every aspect of the in-house legal department's functions. From managing law firm engagements or analyzing documents, to sharing information or reviewing invoices, there is automation for just about every touch point. So how do you figure out what your department will benefit from most?

1. Prioritize

Consider the biggest pain points in your department and ask if technology is the right solution. Consider whether there are process changes that can be just as or significantly impactful with a much lower cost (if any) to the department. Next, consider if the right people are involved in the process and doing the work in the most efficient way without automation. Once you've confirmed that technology is the next step, consider how difficult or easy it will be to implement the new solution. Some teams are more open to technology than others. Some leaders have more incentive to automate. Select a process to automate that will have minimal resistance. Technology implementations are challenging enough without dealing with internal struggles and hurdles to adoption. Finally, start with one focused implementation. Going for the complete overhaul is hard, but small identifiable wins lay a great foundation.

2. Establish the current state

Spend time mapping out the current state of people, processes, and systems that are already in place and related to the technology solution you are seeking. Have a clear understanding of the process before starting the technology selection. It is healthy to perform a detailed mapping exercise since it is guaranteed to identify inefficiencies and quick gains. Define the impact to all stakeholders and how you will need to communicate with them. Know who is most sensitive to the automation and whose roles will be most impacted.

3. Define goals and requirements

Once the current state is mapped out and all stakeholders are identified, define the success measure for the implementation and goals for the new solution. These high-level markers will keep everyone focused and prevent scope creep. Then define your business and technical requirements for the solution. What must the technology do? What must it integrate with? Are there some nice-to-haves but not deal breakers? Also, consider future integrations and expansion of the functionality of the system.

4. Pick the solution

Now you are ready for the selection process. Work with someone experienced in procuring technology. Follow standard protocol but include the attorneys who will be impacted. They are the domain experts but will need guidance from operations or procurement to understand the impacts of the goals they have for this system. It is easy to dream big, but a reality check is always useful.

5. Plan, plan, plan

Plan for what can go wrong and for disappointments along the way. Define a solid communications plan with all stakeholders, right-sizing the amount and type of information shared about the implementation. With input from the

tech solutions provider, develop a training plan and materials. Make sure you have access to people with IT skills who can provide guidance and support. And of course, have a plan B. For further information on the essentials of change management, be sure to check out our accompanying guide, [The In-House Counsel's Guide to Change Management](#).

TALES FROM IN-HOUSE TECH ADOPTION



Ted Lazarus, Google Legal Director

“I think we’re seeing that the power of technology to connect people—in particular, the ability to create a cross-functional dialogue—is transforming the in-house legal function. It is more closely integrating lawyers into the day-to-day operations of the businesses they support.”



“Any legal tech that saves an attorney time through increased efficiency is inherently valuable, and attorneys—more than almost any profession—know the value of time.”

—Roberto Facundus
Tongal



Roberto Facundus, SVP, Legal & Business Affairs at Tongal

“Especially for in-house counsel, anything that saves time is welcome. There’s a disconnect in the way outside counsel and their clients—in-house counsel—work [together]. One is incentivized by increasing time worked, that is greater billable hours, and the other is incentivized by decreasing time worked. In-house attorneys don’t make money on time spent working so working efficiently is imperative. Any legal tech that saves an attorney time through increased efficiency is inherently valuable and attorneys—more than almost any profession—know the value of time.”



“The more technology can do the basic legal work the more you realize that actually what you have to do is be a leader who can establish and motivate a great team...”

—Justine Campbell,
Centrica



Justine Campbell, Deputy General Counsel UK and Ireland, Centrica

“The more technology can do the basic legal work the more you realize that actually what you have to do is be a leader who can establish and motivate a great team, who can look strategically into the future and exercise judgement over what really matters, who can give commercial advice and run an efficient function. There is more to it than just giving your legal opinion.”



Alan Konevsky, group Head of Strategic Initiatives Counsel at Mastercard

“In the transformation of the delivery of legal services, technology is a critical ingredient— whether analytics, equipping our lawyers with access to better knowledge tools, or cataloguing our contracts in a way that is helpful,”



Sterling Miller, General Counsel at Marketo

“One goal set out in my sample legal department goals was to increase efficiency (and reduce costs) in the legal department. One of the easiest ways to do this is through the use of technology. This can mean anything from apps for your smartphone to sophisticated software programs running on servers at your company. But, to be a successful in-house lawyer or general counsel you need to embrace technology and make sure your team does as well. So, if you are afraid of technology, you need to get past that.”

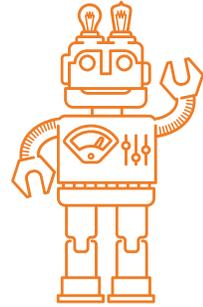


Reese Arrowsmith, Head of Legal Operations at Campbell Soup Company

“[From a technology perspective](#), if all predictions are correct and the changes that are taking place come to fruition, there will be a fundamental change in the way the legal industry works from beginning to end. We have probably all read articles about how [AI] and other technology will reduce the number of lawyers needed. This truly fundamental change will require legal departments and the legal industry to rethink how they function, and the legal operations role will be instrumental in that transition. The developments will change how lawyers learn, do research, make decisions, develop case strategy, and complete document review in support of deals, contracts and litigation.”

CONTRACT AUTOMATION SOFTWARE

-THE CHEAT SHEET-



Over the last two years, no other field of legal technology has evolved as much as contract automation software. As often happens with new technology fields, an inflation of offerings leads to confusion in the naming and definition of these new services.

Therefore, we thought it would be important to define the terminology we use in this guide. This primarily relates to the **Features and Functionality**, and less with where the technology fits within the contract lifecycle.

DRAFTING

Contract drafting software is used to automate the generation of new contracts. These can work using preexisting templates, Drag&Drop interfaces, or online form questionnaires.

REVIEW

Contract review software is used to automatically review "business-as-usual" contracts, pre-execution, as part of the negotiation stage. It is used to flag provisions and issue-spot and can in some cases automatically approve contracts for signing.

DUE DILIGENCE

As opposed to contract review, due diligence tools are used to find specific details or provisions across a large bulk of contracts. These solutions are usually used one-time or on-demand, during discovery or due diligence tasks.

CONTRACT MANAGEMENT

Contract Management or Contract Lifecycle Management (CLM) solutions act as a central digital repository for contracts, with advanced solutions offering calendaring, task and time management, analytics, billing, and more.

EXTRACTION

Extraction is a feature of solutions such as Due Diligence or Contract Management, and it is used to search either individual or a bulk of contracts, obtain specific information, and export it to a file or third-party contract management system.

ANALYTICS

Contract analytics is also a feature of Due Diligence and Contract Management Solutions; it combines data from a large bulk of contracts, either from a specific repository or on an ongoing basis. They provide primarily quantitative information and aggregated data.

www.lawgeex.com/buyersguide



CONTRACT DRAFTING

Contract drafting software enables lawyers to automate the generation of standard legal documents from automated templates. The programs tend to offer questionnaire-style document generation with lawyers able to review and finalize the draft. The software helps legal departments cut hours creating routine and high-volume contracts.

Law departments looking for areas where they can find a ready return on investment have found that their contracting process presents a powerful opportunity to begin the legal buying journey. For writing an initial contract, drafting tools are used by more than half of lawyers, who report a [92% satisfaction level](#) with this relatively basic software that has been around for nearly two decades.



“The game changer with Contract Express is that we simplify the contract drafting process to enable others in the company to do it for themselves.”

—Struan Britland,
ARM

Contract Express

www.contractexpress.com

Cost: \$

[Contract Express](#) (by Thomson Reuters) allows GCs to accurately automate and update their legal templates. The contracts are generated by filling out Web-based forms—also called “questionnaires.” The software allows the automation of templates inside Microsoft Word by using markups. In the words of one client, Seth Weissman, VP and GC of SolarCity: “Sales can create a contract at one in the morning, one in the afternoon or on a weekend, whenever they want. You don’t have to go through my department, and we

will never slow you down.” Notable clients include Reckitt Benckiser, which adopted Contract Express for its 700 non-disclosure agreements per year, and global professional services EY, which is using the software as part of a major document automation project. Cambridge-based Struan Britland, Director of Legal Operations at semiconductor giant ARM, says: “[The game changer \[with Contract Express\] is that we simplify the contract drafting process](#) to enable others in the company to do it for themselves.”

HotDocs

www.hotdocs.com

Cost: \$

[HotDocs](#), acquired in 2017 by AbacusNext, allows companies to transform frequently-used documents and forms into intelligent templates that, in their words, enables “superfast production of custom documentation.” Clients include HSBC Singapore, which uses it to generate facility letters for its corporate customers, and The United States Department of Justice, which uses it across its 94 offices, primarily for litigation paperwork. In New Zealand, HotDocs, in association with its country partner LawHawk, is being used by Bruce Riden, General Counsel for Housing New Zealand, reducing the government agency’s time to create construction contracts from four hours to one hour, while some consultancy agreements take 15 minutes. Riden added: “When we produce contracts using the automation, we average a 75% reduction in the time taken relative to the time had we not used automation.”

Bloomberg Law’s Draft Analyzer

www.bna.com/draft-analyzer

Cost: not publicly available

[Bloomberg Law’s Draft Analyzer](#) allows the comparison of draft language against EDGAR (Electronic Data Gathering, Analysis, and Retrieval), an online public database from the U.S. Securities and Exchange Commission, allowing teams to see market-standard language. In the words of the company, it ensures “that your language is exceptional only when you want it to be.”

The Best of the Rest

[MerusCase](#) allows in-house teams to prepare templates, auto populate them, and email them directly for review. [Synergist.io](#) enables automation by allowing a sales or procurement team to create legal documents, which then get checked by the in-house team.

CONTRACT REVIEW

Contract review software provides fast and accurate review of everyday business contracts in corporations. Using advances in AI, this software analyzes contracts against a legal team's predefined criteria or industry benchmarks, ultimately allowing businesses to close deals faster.



"It's a challenge for me to keep up with the number of contracts we receive on a daily basis. Since subscribing to LawGeex, we have seen results of 80% time saved, and 90% cost saving when compared to other solutions."

—Dylan Marvin
Brandwatch

Contract review automation is helping to solve a major business pain in that even the most standard non-disclosure agreements [take a week or longer to review and approve in most companies](#). Research shows that 72% of in-house teams admit [there is a need to implement faster contract](#) turnaround times. Contract review automation also enables uniformity in review of contracts across large global companies, effortlessly distributing knowledge and enabling faster and [more accurate issue-spotting than human lawyers](#).

LawGeex

www.lawgeex.com

Cost: \$\$

LawGeex uses AI to automate the review and approval process of everyday business contracts. Its AI reviews uploaded contracts, approving them if they match a pre-defined legal playbook or escalating them to the legal team if issues are found. LawGeex answers the question "Can I sign this?" within one hour, reducing legal bottlenecks and shortening contract turnaround time. LawGeex enables large enterprises to create an explicit and operationally rigorous program for compliance with corporate policy, as everything signed is checked against a [company's playbook](#). LawGeex has customers in over

15 countries, including eBay, Farmers Insurance, and Natixis, and integrates with lawyer's workflows.

ThoughtRiver

www.thoughtriver.com Cost: not publicly available

ThoughtRiver's Contract Intelligence software uses artificial intelligence to flag and interpret information from contracts. It offers data capture and policy management tools and can provide analysis of a document that can be used to automate decisions. ThoughtRiver also provides an NDA [contract risk evaluation tool](#).

LegalSifter

www.legalsifter.com

Cost: \$

Though [LegalSifter](#) was initially targeted towards law firms that want to deliver a branded service to their clients, the company has recently begun providing their software directly to in-house counsel. Following its launch in 2017, the software allows in-house counsel to find problem areas in contracts before signing. Following the uploading of a contract, the software reads and highlights any issues it finds, offering advice as to what the issues are and how they should be addressed.

The Best of the Rest

Other players in the contract review space include [Beagle.ai](#), which analyzes how contract terms are structured and offers real-time contract collaboration. Dutch AI startup [NDA Lynn](#) offers a limited document review for NDAs, providing a service that is currently free. Finally, [Legal Robot](#) assesses fairness in contracts and clarifies complex legal language so all parties can be clear on the terms they are signing.

DIGITAL SIGNATURE

Digital signature software securely associates a signer with a document in a recorded transaction. It enables contracts to be approved or signed by any signatory with Internet access—anytime, anywhere, even on mobile devices—freeing leaders to focus on business issues rather than chasing down documents.



“DocuSign has reduced signing from days to three hours.”

—Alex Butterworth,
McDonald's

Digital signature removes the time for printing, scanning, emailing, or sending documents by mail or courier. In addition to time saved, you'll also have an audit trail that will help if a need arises to discuss the signatures in court. Global consultancy Forrester [points out that “the single, well-understood value proposition](#)—digitizing your business with e-signatures—continues to prove its worth.”

DocuSign

www.docusign.com

Cost: \$

DocuSign strives to provide the strongest legal enforceability of any method of document signing, including paper. The San Francisco company rose to prominence in 2003 and quickly spread in the real estate world for leases and other contracts. The software works by sending an email to the signee, requesting a signature, and then uses red arrows to show where signatures and initials are needed. DocuSign, estimated to have more than [40% of the e-signature market](#) (followed by Adobe with 15%), integrates with

customer relationship and contract management solutions, including Microsoft, Salesforce, and Oracle. Alex Butterworth, Senior Legal Counsel at McDonald's Australia, [says](#): "With DocuSign and electronic signing, we no longer spend huge amounts of money on mailing large packages of documents to franchisees for our restaurants. It is now uploaded and they get an automatic email and can sign there and then. This has reduced signing from days to three hours."

Adobe Sign

www.acrobat.adobe.com

Cost: \$

[Adobe Sign](#) (formerly EchoSign) allows you to send a document via email and set up automated workflows to control the process. With each step, the contract is moved to the next part of the signing process and, once complete, triggers a variety of actions, including invoicing the client or transferring the client to a specific department. Files can be sent directly from the Adobe Sign website, the mobile app, or Acrobat Document Cloud on Windows or Mac, adding a block where you want people to sign. Connie Brenton, Director of Legal Operations at NetApp talks about the most impactful adoptions as "among the easiest to implement," [citing the Fortune 500 company's success in achieving \\$2 million in annual savings](#) using Adobe Sign.

eSignLive

www.esignlive.com

Cost \$

[eSignLive](#) is used by 12 of the top 20 banks in North America, seven of the top 20 P&C carriers in the United States, and seven of the top 20 life insurance carriers in Canada. Michael Laurie, Vice President of Product Strategy at the company, [says](#): "One of the biggest endorsements we've heard legal counsel share has been that judges like the simplicity of e-signatures, especially with eSignLive, which offers a visual audit trail that captures in-depth signing data and shows exactly what screen was shown when and for how long—this is far more evidence than the paper equivalent provides." eSignLive's Professional Plan enables organizations to start e-signing within minutes for only \$20 per user per month, which includes pre-built connectors for Salesforce, SharePoint, and Box.

The Best of the Rest

Offering a wide range of options, including a \$2 pay-as-you-go option, [ESign Genie](#) promises to decrease the number of clicks by 30% to 50%. [Right Signature](#) allows the uploading of most of the popular document types, including Microsoft Word documents and PDFs. [Ceasing](#) (previously Sign Now) is an inexpensive alternative. Its [legal features](#) include tracking in real time when documents are opened, viewed, and signed. Nominated for the Dutch FinTech Awards, [Sign Request](#) offers a comprehensive free service. [HelloSign](#) boasts [55,000 companies paying for their services](#) and 7 million users utilizing the basic features for free (allowing up to three documents per month to be signed or shared). The company has also introduced HelloWorks, which turns PDF forms into easy-to-edit digital files.

CONTRACT MANAGEMENT

Contract management or Contract Lifecycle Management (CLM) is the management of contracts from vendors, partners, customers, or employees. At its most basic, contract management software can be defined as an electronic version of a filing cabinet; however, advanced solutions offer task and time management, billing, email management, calendars, Office 365 integration, client portals, legal research integration, document assembly, e-payments, and virtual-receptionist integration.



“Contract management solutions span a lot of different departments including sales, finance and compliance”

—Mary O' Carroll,
Google

Mary O'Carroll, Head of Legal Operations at Google, notes that contract management solutions necessarily “span a lot of different departments,” including sales, finance, and compliance. She says: “There are multiple stakeholders that want their particular requirements met—and that is just Step One of figuring out if there is a system out there that can meet all these needs.”

Household name document management solutions, including [SAP](#), [Oracle](#), and [IBM Emptoris Contract management](#), are most often used by enterprises with global needs. For instance, SAP (which includes [SAP Ariba](#)) is used by 86% of the Fortune Global 500, offered in 21 languages, and is accessed by nearly 1,350 daily users. These tend to be used to ensure consistency by companies operating on an international level.

“Big Box” lawyer-focused solutions—highly customizable, feature-rich systems with a large price tag—include [Agiloft](#), [CobbleStone Systems Contract Insight](#), [Gimmel Contract Management](#), and [Great Minds Software Contract Advantage](#).

Agiloft

www.agiloft.com

Cost: \$\$

[Agiloft](#) is endorsed, among others, by Sven Riethmueller, based on his experience as SVP and General Counsel at global biomedical company, Molecular Health. Agiloft was awarded both Capterra’s most popular contract management system and [PC Magazine’s Editors’ Choice](#). The company says: “As legal departments are pressured to do more with less, the platform manages mundane tasks—such as print-sign-file and manually tracking the approval process—and automates everything from contracts to time estimates, and beyond.” Cindi Kim, Associate General Counsel at [New York Public Radio](#), says: “Agiloft has been a solid industry leader since the 1990’s and did not pressure or rush us to make our decision. They were patient and respectful and worked hard to understand our unique needs as a non-profit and as a public media organization.”

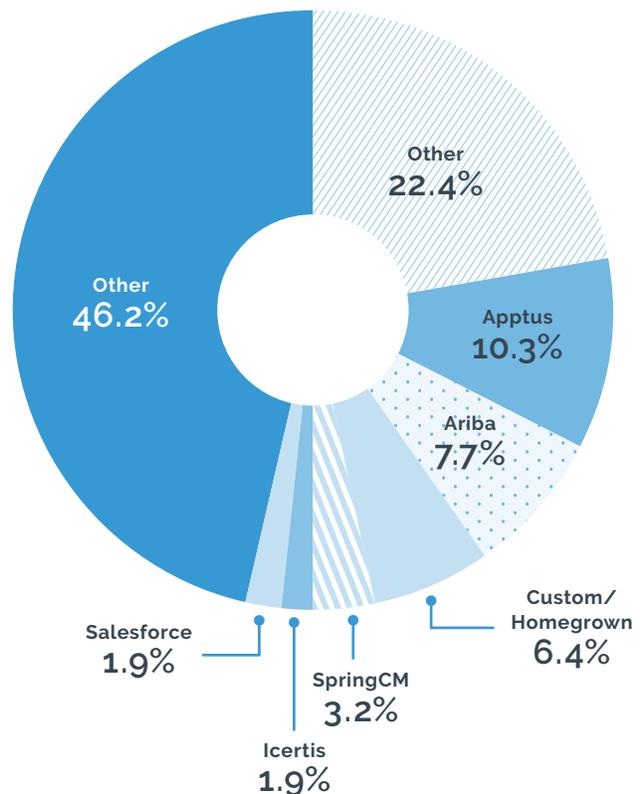
LEGAL OPERATIONS ADOPTION OF CONTRACT MANAGEMENT SOLUTIONS

Nearly half of respondents have no contract management system

33 different vendors are used among the 84 companies that have a contract management system

6 vendors account for 58% of the market share among respondents with a contract management system

SOURCE: 2017 STATE OF THE INDUSTRY SURVEY
CORPORATE LEGAL OPERATIONS CONSORTIUM



Apttus

<https://apttus.com>

Cost: not publicly available

Apttus is out in front for adoption, chosen by more than one in 10 top legal operations professionals, according to a [study by the Corporate Legal Operations Consortium \(CLOC\)](#). The company, one of the first software vendors to build on Salesforce's platform, has now introduced AI benefits, including automatically comparing approved wording with agreement templates, providing contract cycle time prediction, and offering alternative word choice and clause suggestions for drafting. Tami Baddeley, Senior Contracts Program Manager at Microsoft, and her team use Apttus to create, manage, and store contracts, describing the solution as [providing a one-click experience](#) "which was a life saver for us."

Icertis

www.icertis.com

Cost: not publicly available

Relative newcomer, [Icertis](#) demonstrates strong execution across all stages of contract life-cycle management. It is recommended for large enterprise clients that are looking for an adaptable, stand-alone platform. Icertis's software also tracks when terms are met, ensures regulatory compliance, and automates renewal reminders.

iManage

<https://imanager.com>

Cost: not publicly available

[iManage Work](#) includes features such as personalized search, document timelines and intelligent worklists. In addition, iManage's acquisition of the RAVN AI-engine is delivering significant benefits through integrating AI into a document management system. Alex Butterworth, Senior Legal Counsel at McDonald's Australia praises [iManage](#) for making documents [accessible to his 15-person team](#), while integration with Outlook "makes it a lot easier to work in a single space". He adds: "You just open up Outlook and all your files are in one spot, with all of our precedents, all of our final signed documents,

and emails. It prompts you to file your emails whenever you hit send, it can detect which file you are talking about and prompt you where you think it should go.” Mike Murphy, Senior Legal Advisor at Eurotunnel, also settled on iManage after a fact-finding exercise by the company put “[file management and search functionalities as critical requirements.](#)”

ContractWorks

www.contractworks.com

Cost: \$

With a 30-minute setup, [ContractWorks](#) provides legal teams with a searchable repository that allows teams to sign, track, and report on agreements. Features include electronic signature, milestone notifications, custom reporting parameters, an audit log, automated reporting and advanced search to stay ahead of obligations and make better business decisions. “ContractWorks is a company that is growing with us, and that is wonderful,” says Alicia Palmer, General Counsel of Advance Health. “We are not worried about growing out of the software. Their team is very amenable to our suggestions, and acts on our requests quickly.” Another user, Meaghan Faulman, Paralegal at Deckers Outdoor Corporation, calls the system incredibly intuitive and comments on the positive impact ContractWorks has had on their business, as well as how easy it is to train new users. ContractWorks offers a 30-day free trial.

Concord

www.concordnow.com

Cost: \$

[Concord](#) is used to manage the life cycle of contracts, from templates and drafting to negotiations and digital signatures. “Concord is great for solos and teams,” says Mary Redzic who has worked both as a solo practitioner and as an in-house counsel. “You can save templates, and auto populate fields. It’s affordable and really easy to use. They have great cues on how to use their features and they’re really helpful and responsive when you need help.”

Determine

www.determine.com

Cost: not publicly available

Julie Zhao, Senior Contracts Manager in Global Legal Affairs at the United States Pharmacopeia Convention (USP), implemented Determine's SmartContracts, noting: "The centralized contract database is the biggest benefit USP has seen. We can now go into the system from anywhere, make addendums, amendments, and can draft from original documents." Dan O'Connor, Corporate Counsel at Kellogg, says: "Some of the key features important to us included the clause library and the workflow tools."

Salesforce

www.salesforce.com

Cost: \$\$\$

Salesforce has for nearly every vertical for the last decade, been as "synonymous to CRM [customer relationship management] as Kleenex is to tissue." However, Salesforce has only a 5% market share among legal users, according to a report by The Ackert Advisory. Key functionality for contracts includes online management of key contract data, tiered visibility and access rights, contract workflow and task assignment, automated contract approval, contract status, and revision history. Salesforce enables tracking contract renewals to ensure swift renewal or notification of pending contract expiration. Former Salesforce global compliance attorney Roberto Facundus, GC and Chief Operating Officer at Tongul, an online marketplace for creatives, says: "I became fairly familiar with the functionality of the platform that goes beyond merely tracking and reporting sales. The business was already using Salesforce on the sales side so we only had to implement a few additional features through the Salesforce API and educate our employees on usage to capture additional data that is helpful in running the legal and operations side of the business."



Salesforce enables tracking contract renewals, to ensure swift renewal or flag the contract and notify the contract and account owners of pending contract expirations.

Conga Contracts

<https://getconga.com> Cost: not publicly available

Conga Contracts (formerly Novatus) automates the entire contract life cycle management. Sterling Miller, GC of Marketo, a leading marketing automation platform, implemented Conga after a thorough search of contract solutions. Miller says: “We are very excited and looking forward to a lot of efficiencies and times savings, plus more do-it-yourself opportunities.”

ContractRoom

www.contractroom.com

Cost: \$

Starting at \$39 per month, **ContractRoom**, the contract management platform of UnitedLex, is designed for in-house counsel dealing with large volumes of contracts. It uses both transactional and behavioral data to learn how people agree on a deal. Its clients include DXC Technology, which turned to the technology after it experienced a **large increase in contracts** after its formation, following the merger of Computer Sciences and Hewlett Packard Enterprise.



“We submitted Request for Proposals to 23 vendors and Springcm provided the best bang for the buck.”

—Wesley Bullock, Practice Fusion

Effacts

www.effacts.com

Cost \$\$

Designed for in-house lawyers, **Effacts** (by Wolters Kluwer) includes a smart repository for the organization of documents, detailed reports, summaries, and tracking. Hein Bijl, GC of luxury hotel chain CitizenM, says his legal team previously spent hours scanning signed agreements and then “even more hours trying to find them on the server.”

SpringCM

www.springcm.com

Cost: \$

SpringCM, a Salesforce Platinum Partner, manages contracts, documents, and all types of content, accelerating productivity. The product, used

by global brands including Facebook and Google, includes workflow, mobile, and security features that eliminate time-consuming manual steps. Wesley Bullock, senior contracts manager at Practice Fusion, a 400-strong technology company, said: “We submitted Request for Proposals to 23 vendors and SpringCM provided the best bang for the buck. The Sales, Business Development, Finance, Technical Operations and other teams will now have quicker, easier, and reliable access to the documents they need to do their jobs and review their contractual obligations.” Stephen Scorziello, Chief Operating Officer, Legal, Compliance & Public Affairs at Marsh & McLennan Companies, added that the company has “great customer service.” Pricing starts at \$39 per month.

The Best of the Rest

Silicon Valley startup [Ironclad](#), founded by CEO Jason Boehmig, former corporate attorney at Fenwick & West, [aims to automate the way legal contracts are created and managed](#). Early clients include GoFundMe, Glassdoor, and HotelTonight. UK startup [Juro](#) is applying a design-centric approach and machine learning technology to help businesses speed up the authoring and management of sales contracts. The platform includes contract creation, e-signing, and commenting capabilities. [ContractSafe](#), co-founded by former General Counsel Ken Button, covers all bases, including search, deadlines, access from anywhere, and it is fairly inexpensive. [Coupa](#) includes authoring, collaborating, and signing, alongside spend tracking and renewal alerts. Famous for transforming law firm operations, [Clio](#) also markets itself as the “essential tool for in-house counsel.” It includes matter management, time tracking, excellent integration, storage of documents and contracts, and secure collaborations. Boston-headquartered [Exari](#) counts major banks and insurance brokers among its clients that report strong usability for contract authoring. New player, [ContractPod](#), uses technology from IBM Watson and acts as a single touch-point repository for documents, also providing search and management. The price for a business is \$165 per user per month (based on up to 20 users per month).



The ABA Legal Technology Survey Report found that 65% of lawyers have downloaded Dropbox.

[Dropbox](#), Box, and Google Drive are basic means to manage documents. Dropbox is an online storage vault for your files that syncs with a designated folder on your computer and across mobile devices. The [ABA Legal Technology](#)

[Survey Report found](#) that 65% of lawyers have downloaded Dropbox. [Box for Legal](#) is used by corporations and government entities globally. With secure document sharing, collaboration and workflows, teams work on legal briefs, contracts, and M&A in a shared workspace where discussions and documents don't get lost. The platform also saves edits, allowing users to see their most recent work, avoiding wasted time on outdated versions. Local storage, control of the encryption keys, data classification, and retention, are key features. Mary Redzic, former in-house counsel for the Vionic Group, said: "Dropbox is good, but Box has a nicer and easier to use user interface. I used it when I was in-house and it was really easy to navigate and search." [Google Drive](#) is a cloud file-sharing service, similar to other services but integrated into Gmail, Google Docs, Sheets, and Slides. It easily allows documents to be shared and edited by multiple people.

LEGAL AND MATTER MANAGEMENT

Legal and matter management refers to activities involved in managing all aspects of the corporate legal practice (“matters”).



“Managing workflows on our own without going to IT — that’s a home run”

—Jeff Franke,
Yahoo

Streamlining legal activities is crucial, with **69% of in-house lawyers surveyed** strongly agreeing that having a consistent, formal process for managing legal matters gives them the foundation to complete tasks more efficiently. This software helps expedite collaboration and enhance legal workflows and provide greater analysis and reporting of completed tasks, while also serving as a repository for requests, approvals, and completed agreements.

Mitratesch TeamConnect

www.mitratesch.com/teamconnect

Cost: not publicly available

Mitratesch’s TeamConnect Legal Management Platform, already used by nearly 40% of Fortune 500 companies, came out on top as the most widely used matter management system and the second-most widely used eBilling system in the **2017 HBR Consulting (HBR) Law Department Survey**. The solution, which combines matter management and eBilling, received a further boost in 2018 with Mitratesch’s acquisition of startup **ThinkSmart**, a workflow automation platform. Both products will continue to operate separately. Praising ThinkSmart, Jeff Franke, **Senior Director of Legal Operations at Yahoo**, says that “managing workflows on our own without going to IT — that’s a home run.”

Onit

www.onit.com

Cost: not publicly available

Enterprise legal management solution, [Onit](#), has been praised by David Cambria, Global Director of Operations at ADM, an agricultural processing company active in 160 countries with 35,000 employees. “[We saw Onit’s platform and approach to managing all aspects of a law department](#) as an accelerator to ADM’s vision” says Cambria. Lauren Giammona, Director of Operations, Business Affairs & Legal at PayPal, adds: “We really focused on a system that provided more of the back-end and the analytics that we needed,” explaining the company opted for an Enterprise Legal Management system “that actually allowed for creating common processes and automation.” [Libby Troughton, Senior Manager, Legal IT at The Home Depot](#), adds that since implementation, the company has seen “exceptional process improvement for our client communications, reporting metrics and speed in which we can turn around contracts.”

Passport Legal Matter Management

www.wkelmsolutions.com

Cost: not publicly available

[Passport Legal Matter Management](#) provides visibility across a matter portfolio to inform strategic decision-making, available as a stand-alone application or combined with [Passport Legal Spend Management](#), enabling outside counsel e-billing and in-depth analysis of matter costs and legal spending.

SimpleLegal

www.simplelegal.com

Cost: not publicly available

[SimpleLegal](#) provides a modern legal operations platform to streamline the way corporate legal departments manage their matters, track and interpret spend, and collaborate with vendors and law firms. The solution combines

billing, matter management, accruals automation, and advanced reporting. The company also introduced Legal Requests, which processes requests from the internal legal team as well as teams in other departments. Once approved, a matter is created directly within the SimpleLegal platform without manual intervention. Customers include Ancestry.com, Change Healthcare, PopSockets, Splunk, and Spotify.

Best of the Rest

Chris Fowler, BT's GC for UK commercial legal services, is using online project management [SharePoint](#), which allows users to upload documents and create columns and tags for them, creating a centralized environment for attorneys to consume relevant real-time data. In the words of Fowler: "[Eighteen months ago, we wouldn't have realised what we could do with SharePoint](#). People are demonstrating how technology can take some of the noise away and allow us to focus on the coalface stuff." SharePoint offers a [number of advantages to in-house legal teams](#) including low initial setup and configuration costs, low ongoing costs, and ease of use. [Jira Core](#) from Asana-creator Atlassian is used by legal departments to manage legal matters and respond to contract requests for \$10 per month for up to 10 users. Anna Hale, [General Counsel at Australian-listed Megaport](#) says: "From an in-house legal team perspective, the reporting functionality in Jira is a godsend."

CONTRACT DUE DILIGENCE

Contract due diligence is a new breed of legal software grounded in machine learning that assists lawyers in uncovering relevant information from their contracts. Using this software, law departments can accelerate and improve the accuracy of contract data extraction and regulatory compliance, particularly in light of ever-changing compliance rules globally, from IFRS, Brexit or Europe's new General Data Protection Regulation.



Employing AI, Kira comes pre-trained to find more than 450 pre-built machine learning models for commercial compliance, lease abstraction, and GDPR.

This is enabling in-house teams to ensure contracts are not hiding obligations, service level agreement metrics, or other liabilities exposing the company to risk. When an event occurs, the faster you can access those contracts and make the necessary determinations, the more money you'll save and the less you will slow down business.

Kira

www.kirasystems.com **Cost: not publicly available**

Kira Systems helps enterprises uncover relevant information from unstructured contracts and documents. Employing AI, Kira comes pre-trained to find more than 450 pre-built machine learning models for commercial compliance, lease abstraction, and GDPR. Kira is designed to help companies who lose an average of 5%-12% of contract value due to lapses in the administration of obligations.

Rafael Carmona, Vice President of Global Licensing at TIBCO software, uses Kira to track and assess existing contractual obligations, including GDPR.

Seal

www.seal-software.com

Cost: \$

[Seal](#) can crawl a network to discover and classify all of a company's existing contracts. The software analytics and discovery tell you where all your contracts are and what they contain, at scale. Heather Mars, General Counsel at global financial news and services company, TheStreet, [said](#): "We selected Seal a year ago to bring some rigor and process to our new and legacy contracts. Having completed that project, we now want to derive greater insight from the contracts, ensure we are meeting regulations as they pertain to contracts and identify revenue recovery opportunity and cost saving measures, again, from within the contract corpus."

LinkSquares

www.linksquares.com Cost: not publicly available

[LinkSquares](#) is an AI-powered contract analytics platform, saving in-house counsel at companies such as Carbonite and DraftKings thousands of hours per year manually reviewing and reporting on key contracts. For instance, a search across contracts of "*notify client of a security breach*" can quickly find which clients need to be alerted if a security breach occurs. Tim Parilla, General Counsel at DraftKings selected LinkSquares after searching for a method to centralize the fantasy sports website's critical information for easy access and review. He says: "We were able to get up and running in several weeks while other providers were talking about needing 12 to 18 months before full implementation would be possible".

LEVERTON

www.leverton.ai

Cost: not publicly available

LEVERTON develops and applies AI to extract and manage data from corporate documents in several languages and has more than 100 global corporate and investor clients, with a particular specialization in property. Tom Piper, Legal Counsel (Property) of Sports Direct the UK's largest sporting goods retailer, uses LEVERTON's multi-language capabilities for review and analysis of documentation for its property portfolio in Continental Europe to enhance the "quality and efficiency of our lease management processes". JLL, a global financial and professional services firm specializing in real estate, also uses LEVERTON to extract and manage key terms and data from corporate documents, such as leases and contracts, in more than 20 languages.

The Best of the Rest

eBrevia uses artificial intelligence based on technology developed in partnership with Columbia University to analyze contracts, bringing accuracy and speed to due diligence, and lease abstraction. To date, the company reports a 30%–90% increase in speed with a 10% increase in accuracy.

Luminance, one of a handful of legal AI UK companies, is designed to help lawyers work on mergers and acquisition due diligence. While primarily used by law firms, Luminance is increasingly used by in-house teams, for instance, leading asset manager Arcadis.

LEGAL RESEARCH

Legal research is the process of finding an answer to a legal question or checking for legal precedent that can be cited in a brief or at trial.

With the rise of new players, famous names such as LexisNexis have ample competition in this space. Richard Susskind comments that legal searches will be affected by “emerging systems.” He says that “if properly primed, (these searches) are now able, in terms of precision and recall, to outperform paralegals and junior lawyers when reviewing and categorizing large bodies of documents.”

Practical Law

www.uk.practicallaw.thomsonreuters.com

Cost: not publicly available

In legal research, Thomson Reuters’ [Practical Law](#) gets the thumbs up from a wide range of in-house lawyers. Sterling Miller, General Counsel and Corporate Secretary at marketing automation leader, Marketo calls it his “number one favorite bit of technology.” He says the solution “gives you instant access to simple, useful articles, forms, checklists, practice notes, and memoranda. For example, if someone in the business calls you and says ‘I need to know the ins and outs of insider trading in the next hour’ you go to the Practical Law website, type in ‘insider trading’ and you will instantly get back several articles discussing the topic in simple ‘black and white’ along with checklists, sample insider trading policies, sample memos to the client, and other useful materials.” Bridget K. Marsh, Senior Vice President and Deputy General Counsel at The Loan Syndications and Trading Association adds: “The practice notes, articles and updates contain all the information I need to have at my fingertips and is packaged succinctly.”



“Practical Law gives you instant access to simple, useful articles, forms, checklists, practice notes, and memoranda”

— Sterling Miller

Casetext

www.casetext.com

Cost: \$

Casetext provides deep insights into cases cited in legal documents through its AI-powered assistant CARA (Case Analysis Research Assistant). Using natural language understanding, Casetext scans the text of legal briefs to locate and analyze case citations, understanding research context and customizing results to help you find on-point authorities faster. In 2018, updates meant that CARA now works with any type of litigation document, including complaints that contain no citations, in order to find facts and issues. This latest update has been described by one commentator as a “major advance in legal research.” The company also offers access to 10 million court cases and statutes annotated by a community of litigators. The price for an individual is \$139 a month.

ROSS Intelligence

www.rossintelligence.com

Cost: not publicly available

ROSS Intelligence, an AI solution leveraging IBM Watson, scans a large database of questions to provide information that is likely to be relevant to the inquiry. Bankruptcy was the first area of law for which ROSS was designed, but it has quickly expanded to IP and employment law. In 2018, Ross launched free tool EVA, following Casetext into the case analysis market. Discussing the launch of EVA, lawyer and journalist Bob Ambrogi says: “**In a nutshell, it is a brief analyzer. But it is more than that.**” Most notably, it is also a tool for checking the subsequent history of cited cases and determining if they are still good law.”

Fastcase

www.fastcase.com

Cost: \$

Fastcase is a legal research site described by one in-house counsel as “really easy to use and affordable. LexisNexis and Westlaw always felt clunky and were difficult to use. They may have improved the last few years, but Fastcase was way ahead of them from the beginning.” In January 2018, the company also acquired Docket Alarm, a company that mines federal and state court dockets to provide litigation alerts and case-prediction analytics. Fastcase CEO Ed Walters says that with the company’s recent innovations “there are vanishingly few advantages that the old players have left.”

Westlaw

www.westlaw.com

Cost: not publicly available

Thomson Reuters Westlaw Legal Department Core package provides access to content, including annotated statutes from all 50 states; USCA, CFR, and the Federal Register; and topical case highlights. Like Thomson Reuters Practical Law, it taps into the knowledge of more than 200 attorney editors.

LexisNexis

www.lexis-nexis.com

Cost: not publicly available

LexisNexis provides exclusive content and public records, legal news, and business solutions, available via fast, efficient, and intuitive research tools. One user said: “LexisNexis has improved their database significantly in recent years to create a competitive product in comparison to Westlaw. Some of the best features are easy to use interface and natural language search, with good coverage of case law.” According to the American Bar Association, the number of survey respondents using Lexis or Lexis Advance has **increased 32%** since 2012. The company has also released a new AI-driven legal research platform, *Lexis Answers*.

The Best of the Rest

Free service [Google Scholar](#) provides access to a wide range of legal materials, all of which are accessible and searchable via a user-friendly interface. Judicata has also created a new tool called [Clerk](#) described by founder Itai Gurari as “[moneyball](#)” for motions. He explains: “Just as different batters have different on-base percentages, different motions have different probabilities of being granted or denied,” It works by uploading a brief, with Clerk issuing a report assigning an overall grade, an analysis of strengths and weaknesses, and recommended action items. Bloomberg Law also introduced AI-driven [Points of Law](#), aiding legal researchers to quickly find language critical to a court’s reasoning and supporting their legal arguments. Encompassing [one million points of law](#) from its database of 13 million published and unpublished state and federal court opinions, the software won the American Association of Law Libraries New Product Award in 2018. AI-company [LitiGate](#) provides argument analysis. Having secured partnerships with litigation departments at top global law firms, the company has begun targeting in-house legal departments at insurance companies, helping with simple claims such as debt and personal injury claims, providing the ability to review and compare against past cases to produce counterarguments or establish fallback positions. [Blue J Legal](#) founded by Benjamin Alarie, a law professor at the University of Toronto, predicting how courts are likely to rule on new tax cases.

eDISCOVERY

Electronic discovery (also known as eDiscovery) is the electronic aspect of identifying, collecting and producing electronically stored information (ESI) in response to a request for production in a lawsuit or investigation. The eDiscovery market is set to hit [\\$18.49 billion](#).

In recent years, law departments have found that bringing eDiscovery in-house can substantially reduce discovery costs, which [can account for as much as 70% of the cost of any legal action or lawsuit](#).

It is an area where there is a surprising amount of control for an in-house lawyer if you spend time upfront to get it right rather than ceding process to outside counsel. Microsoft has saved [at least \\$4.5 million annually bringing its eDiscovery in-house and has brought its knowledge to its own Office 365 eDiscovery system](#) (reviewed below). The 500-strong legal team at Novartis centralized eDiscovery, leading to productivity savings of \$30 million. Maurus Schreyvogel, Head of Operational Excellence at Novartis says: “Tech gives us the freedom to assign work to people globally. We are now no longer forced into giving document discovery work to external firms. Instead, we can use eDiscovery vendors around the globe. Using IT systems reduces costs from \$130 to around \$70 an hour.” Wendy Riggs, Twitter, senior Manager eDiscovery and Litigation, says [the company uses technology to handle data identification, preservation and collection in-house](#). Her team processes documents for smaller matters and investigations, using vendors to host data, and relies on outside counsel for review in more complicated matters.

Logikcull

<http://logikcull.com>

Cost: \$\$

Logikcull allows users to drag and drop large amounts of data such as emails, Slack messages, texts, and office documents into a database that can easily be searched. Brian Carroll, General Counsel at Level Up, an American mobile payments platform, said: “I am most happy with the simple and intuitive user interface. We were able to set up and start using the tool immediately. It is flexible enough to deal with a variety of load file formats. And the review, tagging and culling tools are exactly the right level of tools for efficient document review.” Logikcull has an option for pay-as-you-go (\$40 per gigabyte per month) or an enterprise subscription.

Onna

<https://onna.com>

Cost: not publicly available

Onna aids in-house legal teams with eDiscovery and other workflows related to data management, such as finding responsive files for compliance or GDPR, and connects with Slack and several other new media platforms, including Jira, Zendesk, and GitHub. When Brian Hupp, Head of Legal Operations at Facebook, sought to gather disparate data, he turned to Onna, a Gartner Cool Vendor winner, to “bring the benefits of e-discovery search into the department” to meet a host of objectives. They included connecting data sources across multiple systems and enabling quick and easy browsing of all data the department held. The quick wins for the team included being able to “share the data [they hold] across a topic” says Hupp.

Relativity

<https://www.relativity.com>

Cost \$\$\$

Lisa Alleyne, Senior Counsel at Bell Canada, recommends eDiscovery software from Relativity (from kCura), commenting: “Most of the hosting vendors would use that or have access to a variation of it, and it’s essentially a technology-assisted review format. It helps you to tag your documents, making it easier



“Using innovative technology like this is no longer optional—it is essential given the volume of material we are dealing with”

— Ben Denison
Serious Fraud Office

to identify duplicates. The software works so that if someone reviewed the first document and tagged it, the system recognizes the duplicates and will tag all the others so that someone doesn't have to review each independent document.” [Chrysler Litigation Support Manager](#), Barbara Bennett, said: “Relativity's community of users is an invaluable resource. I rely on feedback from rich and varied backgrounds to help me identify best practices and provide a level of validation to my business partners.”

OpenText

www.opentext.com

Cost: not publicly available

[OpenText Axcelerate](#) helps legal teams identify the facts that matter for litigation, compliance, and governance. It allows users to identify key phrases within documents and create a rich conceptual map based on relationships among words, as well as spotting data sent to a personal account or an unknown third party. It also allows automatic redaction of sensitive data such as phone numbers, SSNs, and credit cards. UK fraud enforcer, The Serious Fraud Office (SFO), deployed OpenText Axcelerate to expedite its investigations, arguing [that the technology was up to 80% cheaper than using outside counsel](#) to review those documents and identify legally privileged material. Ben Denison, Chief Technology Officer at SFO, said: “Using innovative technology like this is no longer optional—it is essential given the volume of material we are dealing with.”

Zapproved

www.zapproved.com

Cost: not publicly available

[Zapproved](#) is a leading eDiscovery software provider for managing corporate litigation readiness, boasting 25% of the Fortune 100 as clients. Zapproved discovery suite and flagship product Legal Hold Pro is widely used and has earned recognition with numerous awards. The company says that one client alone has seen the average time needed to initiate a legal hold [drop from 75 minutes to just 15 minutes](#)—translating to a savings of nearly \$100,000 per year.

Exterro

www.exterro.com

Cost: not publicly available

Exterro offers solutions for legal hold, early case assessment, review, and a wide range of integrations. Clients include United Healthcare, Michelin, Starbucks and Target. Christopher Sitter, Head of Global E-Discovery & Digital Forensics at Juniper Networks says that by utilizing [Exterro Legal Hold](#) and [In Place Preservation](#), they are “set up so that the moment we receive any indication of activity, we can do published or unpublished holds through the Exterro system, and the greatest benefit of this is the automation. It powers us to start preserving data within a matter of seconds of receiving that email.”

Microsoft Office 365 for eDiscovery

www.microsoft.com

Cost \$

Microsoft has set out the capabilities of [Microsoft Office 365 for eDiscovery](#) based on the software giant’s expertise of “many discovery requests every year,” with the solution reducing the amount of content in a case by about 95%. Microsoft’s in-house team uses the eDiscovery features of Office 365 to thread email conversations, remove duplicates, find near-duplicates, and identify themes.

The Best of the Rest

Other recommendations include [Inventus Luminosity](#)—described as cutting edge and “easy to use.” It utilizes Relativity but has a number of customized solutions. [Percipient](#) is described as “doing some really neat things with eDiscovery.” The company also has many years of actual litigation and electronic discovery experience. [Catalyst](#) designs, hosts, and services document repositories for large-scale discovery and regulatory compliance. The company introduced Insight Enterprise, a platform specifically designed for corporate general counsel to centralize, simplify, and reduce the cost of eDiscovery across all their litigation, investigation, and compliance matters.

PREDICTION AND LITIGATION TECHNOLOGY

Considered a subset of legal analytics, predictive technology analyzes past legal reference data to provide insights into future outcomes. This new generation of legal technology has been made possible by advances in machine learning and AI. Practical applications include forecasting a judge's holding in litigation, or an examiner's allowance of a patent application. This brings companies a new layer of information in making legal choices.

Premonition

www.premonition.ai

Cost: not publicly available

Premonition describes itself as giving a “very, very unfair advantage in litigation.” The Miami-based Artificial Intelligence company boasts Motions Analyzer, which the company says can increase the odds of winning in litigation by showing the win rate of motions in a particular court. For example, based on statistics, the company suggests a change of venue may be the best motion for a specific case type in a particular court. For example, based on statistics the company suggests a change of venue may be the best motion for a specific case type in a particular court. Premonition, working with Fortune

500 companies, has a number of applications including “going down to the lawyer you need to represent you for a particular case type.”

Allegory

www.allegorylaw.com

In November, global legal services provider Integreon announced its acquisition of cloud-based litigation management platform, Allegory, founded in 2012 by former Gibson Dunn litigator Alma Asay. Integreon promptly announced an evidence-management dashboard for Allegory users that allows inside and outside counsel to work collaboratively within a single platform and gives them the ability [to analyze all case information for a single matter or across matters](#). This allows corporate counsel to stay informed about multiple cases their company is involved in, outside law firms working on the case, and evidence and pleadings.

Lex Machina Motion Kickstarter

www.lexmachina.com **Cost: not publicly available**

[Lex Machina Motion Kickstarter](#), which has been acquired by LexisNexis Legal, enables “attorneys [to] view granted motions with denied motions to see what’s working and what’s not.” In 2018, the company announced that commercial litigators using the platform can now make decisions based on more than 62,000 commercial cases, with insights including trends in case timing, resolutions, findings, damages, and remedies. You can enter a judge’s name and motion type as well as the briefing that led up to those orders. Lex Predict has built models to predict the outcome of U.S. Supreme Court cases at accuracy levels that the company says challenges experienced Supreme Court practitioners. Scott Hauser, Deputy General Counsel at Ruckus Wireless, says: “[I use Lex Machina throughout the day](#). Whenever a new issue arises, I can see instantly what we might be up against.” Steven Geiszler, U.S. Chief Intellectual Property Litigation Counsel at Huawei, adds: “Surprisingly, many firms still don’t understand that in-house counsel use Lex Machina to cut through the sales puffery in pitches.”

The Best of the Rest

Other notable players in prediction and litigation technology include [Intraspexion](#), which has an “early warning system” in its words, that helps law departments prevent litigation before it happens. The inventive AI solution for the legal profession is owns seven software system patents using deep learning. Using deep learning and NLP technologies surfaces litigation risks in time to investigate further. Litigation analysis AI startup [Gavelytics](#) says it “highlights the vast differences between judges by tracking how each judge tends to rule on over 100 types of motions” as well as judicial speed. It provides a “gavel score,” measuring the extent to which judges tend to rule for plaintiffs or defendants. Since debuting in 2015, [Voltaire](#) has provided information to attorneys [in 105 trials on how jurors may vote](#). The company says its revenue has grown by more than 200% in the last year. [LegalMation](#) describes itself as a “litigator’s trusted assistant.” It produces high-quality first drafts of answers and initial written discovery in about two minutes—tasks that normally take attorneys or paralegals hours to complete in the early stages of litigation. Alan Bryan, who leads Walmart’s Office of Outside Counsel Management and Legal Operations, [says the retailer uses the AI tool to analyzes legal complaints and prepare legal responses](#) to address the company’s high volume of lawsuits. “We’re just making this part of their initial assignment,” Bryan said.

INTELLECTUAL PROPERTY

IP management software supports the automated tracking of patents, trademarks, copyrights, IP, and licensing, while also including reporting and analytics.

Law departments have found that IP is most often a company's most valuable asset and there are some clear advantages to controlling this in-house. Burgeoning technology is helping with invention disclosures, docketing, deadlines, filing applications, valuing your IP portfolio, and budgeting. The Enterprise IP Management software market is expected to reach a valuation of [\\$16.5 billion by 2025](#), up from \$4.1 billion in 2016.

Beyond these tools, trademark lawyers can deploy big data sets to more effectively analyze the brands they are protecting. Being able to monitor social media sentiment, for example, can provide a real-time indicator of brand perception and an early warning signal of upcoming issues around a particular brand or trademark.

CompuMark

www.compumark.com **Cost: not publicly available**

Among the leaders, [CompuMark](#) from Clarivate Analytics, has a database of over 9 million designs via its SAEGIS platform. It offers trademark screening, searching, and watching. CompuMark has expanded its world-leading trademark searching and protection offering with the launch of TM go365, bringing an unprecedented level of flexibility, speed, and affordability to the clearance process. It recently rolled out TM go365 Image Search combining

image recognition technology. Steve Pogorzelski, President of CompuMark says: “By simply uploading an image into the tool, attorneys and any other individuals can quickly assess the image landscape and spot images that are identical or closely similar to the image searched.”

Clear Access IP

<https://clearaccessip.com>

Palo Alto startup, [Clear Access IP](#), provides the latest techniques in data science and machine learning to harness information in every issued patent and published application. It allows the import of files (with patent serial numbers) which the software organizes according to your profile, triggering actions required to push the patent forward. New activities on a patent like issuance of a new action are listed under ‘new actions’ allowing the tracking and management of a patent portfolio. It also has a ‘deal room’ allowing the distribution of patent rights to outside parties. CEO Nicole Shanahan says: “Our core mission is to reduce the cost and barriers related to building and trading IP assets. Our tools are designed to eliminate clerical overhead and augment critical decision making around patenting and technology transfer.”

TurboPatent

<http://turbopatent.com>

Cost: \$

The [TurboPatent](#) Automated Invention Protection (AIP) solution uses AI-based technologies to streamline the patent process, offering patent-pending status in 30 days. It promises to patent your IP for a fraction of the cost (up to 50% cheaper) than services charged by a typical law firm. Phil Makrogiannis, VP of Intellectual Property for Life Sciences at \$20 billion Thermo Fisher Scientific, says: “For applications already pending, TurboPatent has been helpful in suggesting claim amendments to overcome patentability rejections (especially 101 rejections) by the USPTO.”

Inteum

www.inteum.com

Cost: not publicly available

Inteum tracks all licensing transactions and agreements and includes a module for tracking the progress of patent applications. European users include Strathclyde, Nottingham, Aston, and Sussex Universities in the United Kingdom. It allows for management of everything from initial invention disclosure, through to, licensing agreements and revenue distribution.

Anaqua

www.anaqua.com

Cost: not publicly available

Boston-based **Anaqua** is used by nearly a million IP professionals in over 150 countries, relating to more than a billion dollars in intellectual assets. Among its global clients is Danish firm Novo Nordisk, a global healthcare company that uses **Anaqua to manage the full lifecycle of its inventions and patents**. This year the company merged with California-based Lecorpio, which focuses on corporates streamlining operations and maximizing the value of IP assets.

TrademarkNow

www.trademarknow.com

Cost: not publicly available

Helsinki-based **TrademarkNow** uses AI across a number of its products, most notably its NameCheck platform. The platform, aimed at enterprise in-house lawyers, promises search results within 15 seconds (for instance, on a new company product or name). The lawyer receives a comprehensive report of similar marks, benchmarked industry data, word meanings in 150 languages, information about registered international domains, and a risk score for proceeding. The company counts IBM and Google among its customers.

WebTMS

www.webtms.com

Cost: not publicly available

WebTMS has been a major name in the space for 17 years. Its clients include The EMI Group, Del Monte, and Emerson Electric. Senior IP Paralegal at Del Monte, [De Ann Freitag](#), said: “We converted our intellectual property portfolio to the hosted Web TMS application in August 2011, and must say that the interactive docket is a great tool. It reports deadlines and reminders for trademarks, contracts, and disputes. Additionally, the search capability in each module permits sub-searches based on the last search results, inclusive and exclusive of user-specified fields, so drill down searching is both convenient and fast.”

The Best of the Rest

Traklight.com is an affordable business risk-assessment and IP self-management and identification platform for small and mid-sized businesses. Traklight reports allow for IP tracking by in-house counsel. [Hazel Trade Secret Asset Management](#) fills a gap for companies with trade secrets but no robust management processes. Hazel helps corporations collect, organize, study, and report metadata related to their trade secrets as well as trade secrets entrusted to them by third parties. Promising to “streamline your in-house IP work,” [Alt Legal](#) helps companies create, track, and analyze intellectual property filings. The software reviews millions of IP filings from government databases and automatically updates filings, identifies key deadlines, and creates new filings without manual effort. Alt Legal [crawls](#) USPTO and TTAB dockets (and soon international trademark databases) to provide automated monitoring of changes and deadline calculations. [PatentVector](#) has a huge dataset of inventions going back several decades, allowing users to easily explore the patterns of innovation, from which fields companies innovate in [to which patents are most influential](#).

EXPERTISE AUTOMATION

Expertise automation software is categorized as the intelligent automation of legal expertise and processes. It provides a simple way for lawyers to build their own legal self-help for their organizations. This can provide a route for creating partial delivery of legal services, such as “walkthroughs” or “virtual assistants” on compliance and regulatory matters for a particular sector or legal field.

Neota Logic

www.neotalogic.com **Cost: not publicly available**



Neota Logic is an AI-driven platform for the intelligent automation of expertise, processes, and documents

Neota Logic is an AI-driven platform for the intelligent automation of expertise, processes, and documents. Neota Logic applications deliver legal, regulatory, compliance, and policy guidance, manage business workflows, and draft contracts and other documents. At the core of Neota Logic is a unique hybrid Artificial Intelligence (AI) engine, which drives substantive logic, user experience, and integrations with external systems. Hybrid reasoning enables incorporation of any algorithm necessary to solve a problem—including logical rules, mathematics, and multi-factor scoring as well as text analytics and predictive analytics using any available tool. Customers include major law firms and corporate legal departments in the US, Australia, and the UK. Neota Logic’s professional services team works with clients to build applications and train internal staff to do so.

Riverview Law

www.riverviewlaw.com

Cost: \$

Riverview Law offers Virtual Assistants powered by the company's "Kim" technology platform. It also facilitates case-management processes so work can be given to the right person. Tami Baddeley, Operations Lead, Legal Operations and Contracting at Microsoft, notes that her team is [dipping its toes into contract AI technology](#) with a six-month pilot of Riverview's AI solution, involving analysis of the contracts of its top 21 strategic partners.

Doxly

www.doxly.com

Cost: not publicly available

Built by attorneys for attorneys, Doxly engages all parties to a transaction—from due diligence to closing—with workflow tools and collaborative document management. Former corporate attorney, CEO Haley Altman, said, "In this day and age in-house counsel actually do their own transactions and when it gets to a certain size they bring in outside counsel. We can provide the same kind of workflow tools and reporting analytics to in-house." Through Doxly's Insights and Reporting feature, managers can gain instant information into how transactions are staffed, as well as customizable reports that analyze key deal trends.

LISA

<http://robotlawyerlisa.com>

Cost: free or Premium

Former lawyer Chrissie Lightfoot developed LISA (legal intelligence support assistant), operating as a legal and commercial app specifically to help entrepreneurs and small-to medium-sized-businesses self-help and self-serve. LISA is being used by GCs in different sizes of businesses in various sectors around the world. Robot Lawyer LISA's AI technology enables GCs (and non-GCs) to create legally binding agreements together with another party, helping to find a middle ground as quickly and cost-effectively as possible. LISA can help parties create free non-disclosure agreements, as well as premium [property-related legal contract tools](#) for commercial lease, residential lease and lodger agreements.

eBILLING

Legal eBilling software automatically tracks and codes legal expenses from law firms. The software provides reports by matter, a centralized workflow, and tracking against budget information.

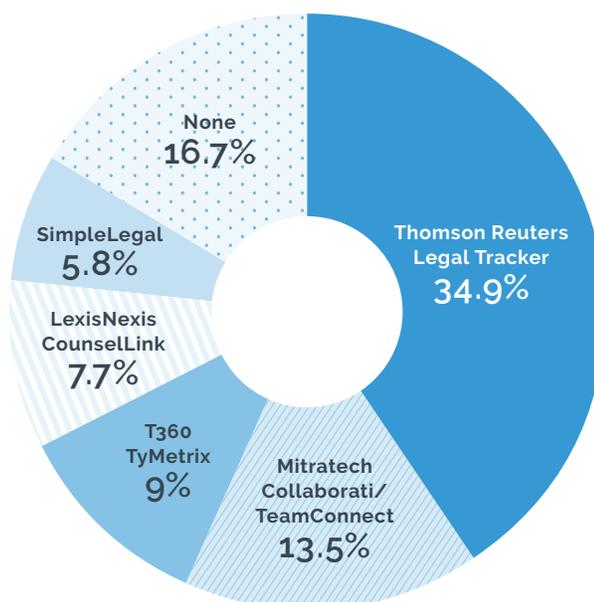
Research by the Corporate Legal Operations Consortium found that **83% of companies with a legal operations function** (a relatively new role designed to entrench business in law departments) has adopted an eBilling system. Kimberly Bell, Head of Legal Operations for Nissan North America **says that** “eBilling almost immediately delivers value by improving process and ensuring that law firms are complying with outside counsel guidelines.” Those switching to eBilling can expect **an average of 4.5% reduction in external legal spend**. Many of the solutions listed under Legal and Matter Management in this guide are leading eBilling players, particularly Mitrtech Collaborati, SimpleLegal and Passport Legal Management. Today’s eBilling systems have evolved to provide an overview of incoming invoices and detailed data on outside counsel activities and billing rates.

LEGAL OPERATIONS ADOPTION OF eBILLING SOLUTIONS

83% OF RESPONDENTS USE AN EBILLING SYSTEM

5 EBILLING VENDORS ACCOUNT FOR **84%** OF THE MARKET SHARE AMONG RESPONDENTS WITH AN EBILLING SYSTEM

SOURCE: 2017 STATE OF THE INDUSTRY SURVEY
CORPORATE LEGAL OPERATIONS CONSORTIUM



Legal Tracker

www.legaltracker.com **Cost: not publicly available**

Top-rated by most in-house users is [Legal Tracker](#) by Thomson Reuters (formerly Serengeti), which is helping legal teams understand payments including outside spend. The adoption of Legal Tracker, the solution most popular among top legal operations ([used by 34% of top legal operations teams](#)), helped Pearson's legal team reduce legal spend by about 20%. Tyco International also used Legal Tracker to monitor all its external legal spend while Nick Hartigan, Head of Legal at UK construction giant, Kier Group, says the software has improved its work allocation and metric measurement.

TyMetrix

www.wkelmsolutions.com/products-overview

Cost: not publicly available

[Bank of Montreal General Counsel Jolie Lin](#) implemented eBilling platform [TyMetrix](#), which checks on rates and disbursements. She said: "Whatever the agreement was between us and external counsel, the system flags all of that and ensures it doesn't go through without people checking it." The adoption of TyMetrix reduced the bank's external legal spend by nearly 20%.

Mitratesch (Collaborati and TeamConnect)

www.mitratesch.com **Cost: not publicly available**

[Collaborati](#) promotes collaboration between corporate legal departments and their outside counsel by providing the ability to see matter entries in near real time. Mitratesch's TeamConnect Legal Management Platform, also combines eBilling functionality. In the past year, UK banking giant, Barclays, has rolled out Mitratesch TeamConnect across its organization. Now each time Barclays lawyers instruct a panel firm, [they raise a purchase order linked to a matter in TeamConnect](#). The law firm receives that reference and law firm



“A light just went on. If I can structure it by practice area, that's going to simplify my reporting.”

—Jerome Walters
PepsiCo

invoices are processed automatically. Stephanie Hamon, Head of Commercial Management, charged with rationalizing the bank's external legal spend, said: “If we want to manage our headcount and cost base, it helps to know exactly where people are based and what they are doing.”

Lexis Nexis CounselLink

www.counsellink.com Cost: not publicly available

Lexis Nexis [CounselLink](#) is used by Aine Lyons, VP and Deputy General Counsel at VMware, to automate the global cloud-infrastructure company's invoice-review process. [She claims the platform gave VMware visibility into the department's spending](#) to explore other outside counsel management strategies and track spend via consolidated dashboards. In the words of Jerome Walters, Director of Business Operations at PepsiCo: “A light just went on. If I can structure it by practice area, that's going to simplify my reporting.”

Best of the Rest

[Tali](#) is a time-tracking tool powered by AI that takes a hands-free, voice-first approach to time tracking and productivity management. Matthew Volm, the company's CEO, says interest has come from “in-house legal teams that want to track their time and couple it with external counsel cost data to get a true sense of cost when it comes to litigation and other matters.” [BusyLamp](#) provides easy-to-use eBilling, matter management, and reporting to help corporate legal operations professionals control costs, save time, and manage legal department strategy, finances, and vendors.

LEGAL ANALYTICS

Legal analytics is the process of extracting actionable knowledge from data to assist in-house legal leaders and decision-makers. The global legal analytics market, valued at \$450 million in 2017, is [expected to reach \\$1.8 billion by 2022](#). This field of legal technology can provide insights on topics as diverse as matter forecasting, process improvement, comparative costs, billing optimization, resource management, and financial operations.

Legal Decoder

www.legaldecoder.com **Cost: not publicly available**

[Legal Decoder](#) analyzes legal spend data to gain more insight and transparency for each dollar spent on outside counsel. It makes budgeting more predictable, improves the invoice and legal spend review process, and drives greater value and efficiency. The legal analytics tool “ingests invoice data” to provide in-house counsel with valuable insight and strategies on how to better control, manage, and predict outside counsel spend. Legal Decoder has a significant legal pedigree. The founder and CEO Joseph R. Tiano, Jr. is a former partner at two American Law 50 law firms.

Brightflag

www.brightflag.com **Cost: not publicly available**

[Brightflag](#) legal spend analytics uses AI to unlock data in eBilling, helping

corporate legal departments control costs. In the words of [CEO Ian Nolan](#): “A client told us they were spending days understanding exactly where their outside counsel had spent their time attending meetings. Specifically, one of their bugbears was different lawyers recording different time for the same meeting, manually going through hundreds of invoice lines.” The company counts Telstra, Rimini Street and [Uber among its clients](#). Julie Sullivan, head of Legal Operations at Rimini Street has used Brightflag to save more [than 5% per year for the company](#).

Clocktimizer

www.clocktimizer.com **Cost: not publicly available**

[Clocktimizer](#) is a Dutch company allowing in-house lawyers to analyze external legal spend and better view internal time management. Using Natural Language processing, it allows legal teams to look at data that can be used to reduce write-offs and build fee arrangements based on historical data.

QualMet

www.qualmetlegal.com **Cost: not publicly available**

[QualMet](#) seeks to [measure the business value of legal services](#). The company aims to aid “legal departments that are under pressure from their bosses to run themselves more like business,” and provide “legal departments [that] are consolidating their panels in some cases from hundreds of [law firms to tens of law firms](#)” with better actionable information. It includes 20-plus metrics that cut across an analysis of legal quality “to facilitating a conversation” around the quality and value of legal services by outside counsel.

[Brian Kuhn](#), co-founder of IBM Watson, developed newcomer, Outside Counsel Insights, an artificial intelligence tool that can analyze external counsel bills. [He says](#): “We found that lawyers designated the wrong task codes between 30 per cent and 40 percent of the time on their bills to clients. We have saved one client almost \$400m — 33 per cent of its annual outside counsel [costs] just by getting the billing right.”



QualMet provides 20-plus metrics that cut across an analysis of legal quality to facilitate a conversation around the quality and value of legal services by outside counsel.

SIMPLE TASK MANAGEMENT

Task management is the process of managing a task through its life cycle. It involves the planning, estimation, and scheduling of the task, as well as the ability to track dependencies and milestones.

Free workflow or task management can give lawyers the ability to capture important information on the go and provide basic oversight into matters. There are plenty of free mobile-based options, keeping legal teams on top of projects.



“The terminology and interface of Asana will be more comfortable for word-driven lawyers. Those who have worked in project-driven organizations or like a more-graphical interface will feel more comfortable in Trello.”

—Catherine Reach

Evernote

www.evernote.com

Cost: free

Evernote is a program already [used by 25% of lawyers](#) providing the ability to capture notes and recordings in a multitude of formats. In-house lawyers can use Evernote in a [plethora of ways](#). Evernote might contain your legal research files, management data, e-mail archive collection, case and matter information, documents, and tasks.

Trello

www.trello.com

Cost: free

[Brian Schmidt, General Counsel at Trello](#), uses the collaboration tool to make his contract review process transparent to his company, advising in-house counsel to create a Trello board showing at what stage contracts are at for

approval. Schmidt says: “If you were trying to get this all done by email, you would never have the whole picture because communications would be siloed between individuals, not shared across teams. Nobody would be able to get visibility into what the teams were working on.”

Asana

www.asana.com

Cost: free

[Asana](#) helps manage matters, providing an ability to sign up through your Google account. It allows teams to create tasks and subtasks and organize them into shared projects, lists, meeting agendas, and other initiatives, with views customizable by project or due date. Catherine Reach, Director, Law Practice Management & Technology for the Chicago Bar Association, discussing the merits of Trello against Asana, comments: “[The feature sets are roughly the same](#). However, the terminology and interface of Asana will be more comfortable for word-driven lawyers. Those who have worked in project-driven organizations or like a more-graphical interface will feel more comfortable in Trello.”

The Best of the Rest

[ProofHub](#) brings together all the elements of planning, collaboration and organization, showing projects’ progress and those that are “slipping”, alongside providing tasks and milestones. It offers a free trial with unlimited users. Legal departments are using [Sago.ai](#) to manage and process compliance for legal hold, subpoenas and GDPR. It allows lawyers to capture documents, emails, extracts, and key intelligence in one searchable solution.

COMMUNICATIONS

Communication and collaboration software for in-house teams could be as simple as investing in quality video conferencing software to better communicate with clients and out-of-office colleagues or allowing remote access to email inboxes and computer desktops. This can instantly save time and money, allowing teams to work smarter and faster.

Thanks to cheap bandwidth and a wide selection of [video conferencing services](#), [trying to coordinate meetings](#) in various geographic locations and interacting with remote workers is no longer the logistical and technical challenge it used to be. IT departments often have preferred solutions and this may be the first place to ask about available options.

GoToMeeting

www.gotomeeting.com

Cost: \$

[GoToMeeting](#) is one of the best-known video conferencing services. Citrix offers three versions: Starter, Pro, and Plus. Starter (which begins at \$19 per month) supports up to 10 participants.

Cisco WebEx

www.webex.com

Cost: free

[Cisco WebEx](#) allows users to record a meeting's video, audio, and on-screen displays; mute and unmute participants; switch hosts with ease; share files;

share screens; and share applications. The free service allows meetings with up to two other people, and plans begin at \$19 per month.



“These are private, important issues you’re dealing with. You need to know who is on the call, and whether they belong there.”

—Craig Walker
UberConference

UberConference

www.uberconference.com

Cost: free

UberConference gives you an easy, powerful, and pain-free way to schedule and run audio conferences, all without requiring annoying PINs. UberConference is free for unlimited calls. It also offers a Business version for \$10 per month, which gives you your own local number for outbound calling to participants, recurring conferences, international dial-ins, and more. CEO Craig Walker sets out some of the [main selling points for lawyers](#). Walker says: “These are private, important issues you’re dealing with. You need to know who is on the call, and whether they belong there.” Once you have the right people on the call, just hit the lock icon, and nobody else can join your conversation. Features include recordkeeping of how long the call lasted to track legal costs.

Slack

www.slack.com

Cost: free

Slack allows you to build a team site and put all your team communications in one place (called “channels”). You can utilize real-time messaging and file sharing, as well as one-to-one messaging for private conversations. You can also search all the information in your Slack project channel, including documents and conversation threads. You can download the mobile app or a desktop version (or both) and create channels for teams or for specific projects. Slack allows you to drag and drop all your files, images, PDFs, documents, and spreadsheets and share them. You can even invite people from outside the company to join a project, and you can label privileged communications and documents.

Skype

www.skype.com

Cost: free

Skype needs no introduction, having become an indispensable technology for modern lawyers. There are two versions for online video conferencing: the free, consumer version most of us know, and [Skype for Business](#). The latter version is ideal if you want to have very large meetings (the standard Skype client is limited to 25 attendees, while Skype for Business raises it to 250). It also allows a sophisticated conference room setup. The paid version costs \$5.50 per month. It adds high-definition video to group conferences, the ability to join meetings from a Web browser (including anonymous connections), desktop sharing, remote control, Outlook schedule integration, and the ability to record meetings.

Legaler

www.home.legaler.com

Cost: free

Sydney-based [Legaler](#) which describes itself as “Skype and Slack for Lawyers” is specifically designed for the legal profession, making online meetings simple and secure with end-to-end encryption for video calls, messaging, file sharing, and screen sharing. Legaler helps you keep all your important meeting details in one place by automatically archiving your meeting notes, duration, recordings, agendas, messages, and files by matter.

Best of the Rest

[Lexop](#) is an email messaging platform with proof of delivery and tracking, including creating cost-savings related to process servers, bailiffs, and couriers. It also provides the ability to serve multiple attorneys within seconds and get a Proof of Service instantly.

ONLINE TRAINING FOR IN-HOUSE COUNSEL

Also known as computer-based training, distance learning, or e-learning, online training is a form of instruction that takes place completely on the internet. It involves a variety of multimedia elements, including graphics, audio, video, and Web links, which all can be accessed through the internet. In the legal world, this includes courses on essentials of everyday technology (such as Excel) tailored to lawyers, to practical learning of new facets of law.

The rise of online legal training comes as schools are belatedly competing to offer introductory modules covering AI, coding and cybersecurity as they seek to catch up with the reality of modern legal delivery. Florida became the first state to mandate that lawyers [complete three hours of continuing legal education \(CLE\)](#) every three years. In the words of Mark Cohen, a prominent legal and technology expert: “[Digital learning provides an excellent opportunity](#) to narrow the experience and skill gaps for law students and practitioners.” Casey Flaherty, another legal expert says: “Providing training is absolutely essential to being a modern, mature legal department. There are training technologies. And there are trainings on technology. Both matter.”

Legal Technology Assessment

www.procertas.com

Cost \$

The [Legal Technology Assessment](#), developed by Casey Flaherty, assesses legal professionals' proficiency with the basic technology tools they use every day, providing training on tasks in which they are deficient. The cost is \$200 and provides video training on carrying out key actions in Word, Excel and PDFs.

Praktio

<https://praktio.com>

Cost \$

Founded by Michigan Law Professor Michael L. Bloom, [Praktio](#) (from \$99) provides practical online interactive contract training. It allows corporate law departments to learn to draft, analyze, and negotiate contracts through a series of "repetitions" and is a "safer place to make mistakes", according to Professor Bloom. He says: "There are so many people who in their day-to-day lives, interact with contracts, and draft contracts and they are making it up as they go along. Here is a space where you can learn what these things mean and learn the basic skills."

HotShot

www.hotshotlegal.com

Cost \$

[Hotshot](#) covers a range of legal and business topics, providing just-in-time learning for lawyers, and helping organizations run more effective training programs. HotShot's founders, Chris Wedgeworth and Ian Nelson, are former leaders of Practical Law Company. The pair saw the success of digital learning in people's personal and professional lives and its need in the legal space, aiming to plug gaps in legal education. Users can select from a growing catalogue of topics that cover both legal and business skills such as accounting and finance for lawyers and the basics of mergers and acquisitions.

The Best of the Rest

For those wanting to stay up-to-date on the latest legal thinking from the world's top universities, [edX](#) delivers free online law courses covering everything from international law to contract law. [Coursera](#) also offers online courses from top universities on everything from European Business Law to the Law and Economics of Media Platforms.

MISCELLANEOUS TECH FOR IN- HOUSE COUNSEL

The previous pages cover technologies helping solve every day pain points of lawyers. The following recommended solutions cover more miscellaneous requirements helping save time and money for in-house counsel.

NotaryCam

[NotaryCam.com](https://www.notarycam.com)

Cost: \$

Sterling Miller, General Counsel at Marketo, says: “Every once in a while you need a notary. Sometimes on the weekend or late in the evening when everyone has gone home.” [NotaryCam.com](https://www.notarycam.com) provides quick access to online notaries available from 8AM to 11 PM EST every day. It’s legal in all 50 US states. The cost is \$25 per signature in the United States (\$79 international).

BreachRespondRS

www.breachresponders.com

Cost: not publicly available

[BreachRespondRS](https://www.breachresponders.com) is an online tool from law firm, Reed Smith, that walks you through a series of questions to help you determine if you have a data incident or a reportable data breach, providing immediate initial assessment reports of the likelihood that notification is required.

Thomson Reuters World Check

<https://risk.thomsonreuters.com>

Cost: not Publicly available

[Thomson Reuters World Check](#) helps prevent businesses from inadvertently being used to launder the proceeds of crime or association with corrupt business practices. Michele Babb, Director Global Employment Law & Compliance at FireEye, Inc [says](#): “If Fireeye is going to partner with a business or a new vendor it can type that company’s name into the WorldCheck and find information about potential corruption and risky behavior.”

WorkthruIT

www.jacksonlewis.com/workthruit

Cost: not publicly available

[WorkthruIT](#) from workplace law firm, Jackson Lewis, provides a Web-based suite of tools for in-house counsel, human resource executives, and managers. WorkthruIT provides better informed , faster employee leave-related decisions, including compliance with Americans with Disabilities accommodation obligations; detailed self-assessments to evaluate an organization’s privacy and data security risks, and aids in determining federal contractor or sub-contractor status of workers.

Priori

www.priorilegal.com **Cost: not publicly available**

Online Talent-Finder [Priori](#) is a legal talent platform for corporate counsel to find, hire and manage vetted top lawyers. Priori’s data-driven request for proposal process (RFP), is incorporated into an end-to-end technology platform. Erin Abrams, General Counsel at ridesharing technology startup, Via, [says](#): “Priori enabled us to get a level of support we would have had a hard time finding otherwise. A comparable attorney at a big law firm would have been approximately five times as much.”

FURTHER READING AND SOURCES

- Sterling Miller: [Ten things You Need to Know as an In-House Counsel](#) is a regular blog covering technology trends and products for in-house legal departments.
- Robert Ambrogi's [LawSites Blog](#) is a must-read for the latest technology in the legal profession.
- Richard Tromans's [Artificial Lawyer](#) site has been named as one of the top 50 blogs in the world covering the topic of AI for any sector.
- Mary Redzic, In-House Counsel, covers the latest legal technology news and reviews on [Disrupt Legal](#) using her legal expertise as she reviews the latest and best products.
- [Legal IT Insider](#), edited by ex-London City Solicitor Caroline Hill, brings the latest legal IT news from the UK, EMEA, US, and APAC regions from the perspective of law firms, in-house legal teams, and tech vendors.
- [Legalpioneer](#) is a passionate global community celebrating startups, stories, and stars of the legal industry.
- Evolve Law is a catalyst for legal innovation, with [interviews and podcasts](#) on the latest players.
- [Stanford's Legal Tech List](#): Explore a curated list of 845 companies changing the way legal is done.
- Software review sites, including [G2 Crowd](#), [Capterra](#), and [Product Hunt](#).

Reports

- Clyde&Co: [The Looking Glass Report 2017](#)
- HBR: [The HBR Law Department Survey 2017](#)
- Corporate Legal Operations Consortium: [2017 State of the Industry Survey](#)
- Thomson Reuters: [Legal Tracker LDO Index](#)
- ALM: [The ALM Intelligence and Morrison & Foerster GC Up-at-Night Resource Center](#)
- ACC: [The ACC Law Department Management Report](#)
- LawGeex: [Comparing the Performance of Artificial Intelligence to Human Lawyers in the Review of Standard Business Contracts](#)
- ABA: [Tech Report 2017](#)
- Bird & Bird – AI: [The New Wave of Legal Services](#)
- CEB/Gartner: [12 Key Trends in Contract Management](#)
- Forrester: [The State of E-Signature Implementation](#)
- Exterro: [In-house Legal Benchmarking Report 2017](#)
- ABA: [Cloud Ethics Opinion around The U.S](#)
- Kathryn D. Betts and Kyler Jaep: [The Dawn of Fully Automated Contract Drafting](#)
- ACC: [Value Championship](#)
- CEB Global: [The Contract Management Challenge](#)
- Deloitte: [Future Trends for Legal Services 2016](#)
- Blue Hill Research: [The Business Value of Legal Spend Management Investments](#)
- Richard Susskind: [Tomorrow's Lawyers: An Introduction to Your Future](#)
- Zapproved: [Bringing E-Discovery In-House, A Recipe for Success](#)

News Articles

- Artificial Lawyer: [CLOC Founder, Connie Brenton on AI and Legal Sector Change](#)
- Fortune: [DocuSign Is the Latest Tech Unicorn to File for an IPO](#)
- Above the Law: [Legal Blockchain Is the New Black](#)
- Artificial Lawyer: [What Really Is Blockchain and Why Does It Matter to Lawyers?](#)
- Artificial Lawyer: [EY to Roll Out Insurance-Focused Smart Contract/Blockchain Platform](#)
- Artificial Lawyer: [Insurance Giant AXA Launches Self-Executing Smart Contracts](#)
- Apttus Blog: [Top 3 Trends in Legal Tech for 2018](#)
- Macleans: [Big Law Is Having Its Uber Moment](#)
- Legal Week: [In-house Legal Technology Trends](#)
- Legal Business: [The I-team: Client Perspective on AI](#)
- Jordan Furlong: [Getting Over Technology](#)
- Legal 500: [New Tech Frontiers and the In-House Counsel](#)
- Mashable: [An AI Just Beat Top Lawyers at Their Own Game](#)
- LawGeex blog: [Tales of LegalTech Adoption: Alex Butterworth, McDonald's](#)
- TechCrunch: [HelloSign Raises \\$16 Million So You Can Stop Signing Paper Documents](#)
- Bob Ambrogi: [6 Questions to Ask Before Selecting A Practice Management System](#)
- Legaltech News: [Despite Nascent Market, Need and Flexibility Drive Contract Management Adoption](#)
- Legal IT Insider: [Case Study: Eurotunnel Rolls Out iManage Work with Ascertus](#)

- [Financial Times: In-house Legal Teams Take the Lead on Speed and Spending](#)
- [Fortune: This Startup Wants to Be the Salesforce for Legal Departments](#)
- [Lexoo: Using Jira to Manage Your In-House Legal Matters](#)
- [Artificial Lawyer: TheStreet Expands Use of Seal Software](#)
- [Artificial Lawyer: Legal AI Cos Leverton + Luminance Win Law Firm and Corporate Clients](#)
- [Legal IT Insider: Luminance Wins Major Asset Manager Arcadis as New Client](#)
- [LawSites: Ross Unveils EVA, A Free AI Tool to Analyze Briefs, Check Cites and Find Similar Cases](#)
- [LawSites: Fastcase to Offer Access to Expert Treatises from Wolters Kluwer](#)
- [LawSites: Judicata Readies Release of Powerful Tool to Analyze Briefs](#)
- [LawSites: Bloomberg Law Launches AI Research Tool to Find Key Points of Law](#)
- [Canadian Lawyer: Bringing eDiscovery in-house](#)
- [LegalTech News: How Facebook's Legal Ops Solved Its Disparate Data Dilemma](#)
- [SkyNews.com SFO Hires Artificial Intelligence Lawyer](#)
- [LawSites: Integreon Unveils the First Fruit of its Allegory Acquisition: An Evidence Dashboard for Inside and Outside Counsel](#)
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- [Legal IT Insider: Barclays Rolls Out TeamConnect and Internal Timesheets](#)

- Artificial Lawyer: [Alex Kelly of Brightflag the Legal AI Billing Analysis Co](#)
- LegalTech News: [Denton's Nextlaw Invests in Qualmet in Effort to Measure Legal Service Quality](#)
- Legal Technology: [Sharepoint for In-House Legal: Have Your Cake and Eat It](#)
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- Inside Counsel: [Four Best Technologies to Add to Your Legal Department](#)
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- LawSites Blog: [Florida Becomes First State to Mandate CLE](#)
- Forbes: [Who Will Train Tomorrow's Lawyers and How Will They Learn?](#)

SPECIAL THANKS

While we spoke to dozens of experts, in the creation of this guide, the following in-house counsel, legal experts and legal operations leaders contributed significant time and expertise in compiling this guide.



VICKY LOCKIE

www.linkedin.com/in/vicky-lockie-90934513



RICHARD TROMANS

@ArtificialLawya



NILEMA BHAKTA-JONES

www.linkedin.com/in/nilema-bhakta-jonesbbb9b114



MARY REDZIC

@maryredzic



CHRISSIE LIGHTFOOT

@TheNakedLawyer



CASEY FLAHERTY

@DCaseyF



MICHAEL MILLS

www.linkedin.com/in/michaelmillsny



NOORY BECHOR

www.linkedin.com/in/noory-bechor



CAROLINE HILL

Legal IT Insider



STERLING MILLER

@10ThingsLegal



LUCY BASSLI

@lucybassli



ALEX BUTTERWORTH

<https://www.linkedin.com/in/alexbutterworth>

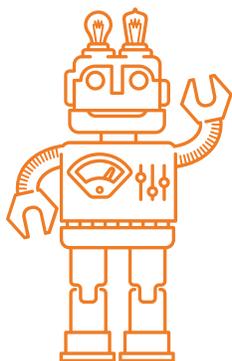
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LawGeex (<http://www.lawgeex.com>) is transforming legal operations using artificial intelligence, and helping businesses save hundreds of hours and thousands of dollars reviewing and approving everyday contracts.

Founded in 2014 by international lawyer Noory Bechor and leading AI expert Ilan Admon, LawGeex enables businesses to automate their contract approval process, improving consistency, operational efficiency, and getting business moving faster.

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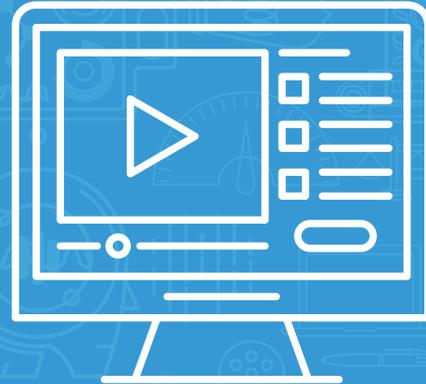




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The Startups that
Revolutionized
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Following the release of the updated LegalTech Buyer's Guide, we are co-hosting a webinar with the biggest names in legal technology.

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