

Briefing

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The collaborative contract

The integration of the artificial intelligence and data visualisation powers of HighQ and document automation of Contract Express can support new process and collaborative change for law firms that neither system could manage alone, say Chris Kitchener and Cassi Waddy at Thomson Reuters

The circumstances of Covid-19 have spectacularly brought the importance of wide strategic investment in technology to enable more efficient working to the fore – and one of the areas where this will be most keenly felt is how teams collaborate on complicated projects. After all, anecdotally managers have widely reported that individual productivity soared during lockdown (albeit with some question as to whether people may in fact be working significantly longer hours than before). But with teams split up for months on end, potentially even longer depending on how different factors play out – granted, frequently connected by a Zoom or Microsoft Teams occasion – how effective are the mechanics of meaningful, outcome-focused collaboration that might make everyone’s lives a little easier?

Chris Kitchener, vice president, product management, at HighQ – which was rapidly acquired by Thomson Reuters just over a year ago – says that the goals of both players were highly aligned at the time, and only became clearer in the context of working through the pandemic. “Our mission was, and it remains, to radically transform the way both law firms and corporate legal departments work and engage, internally and with their clients.

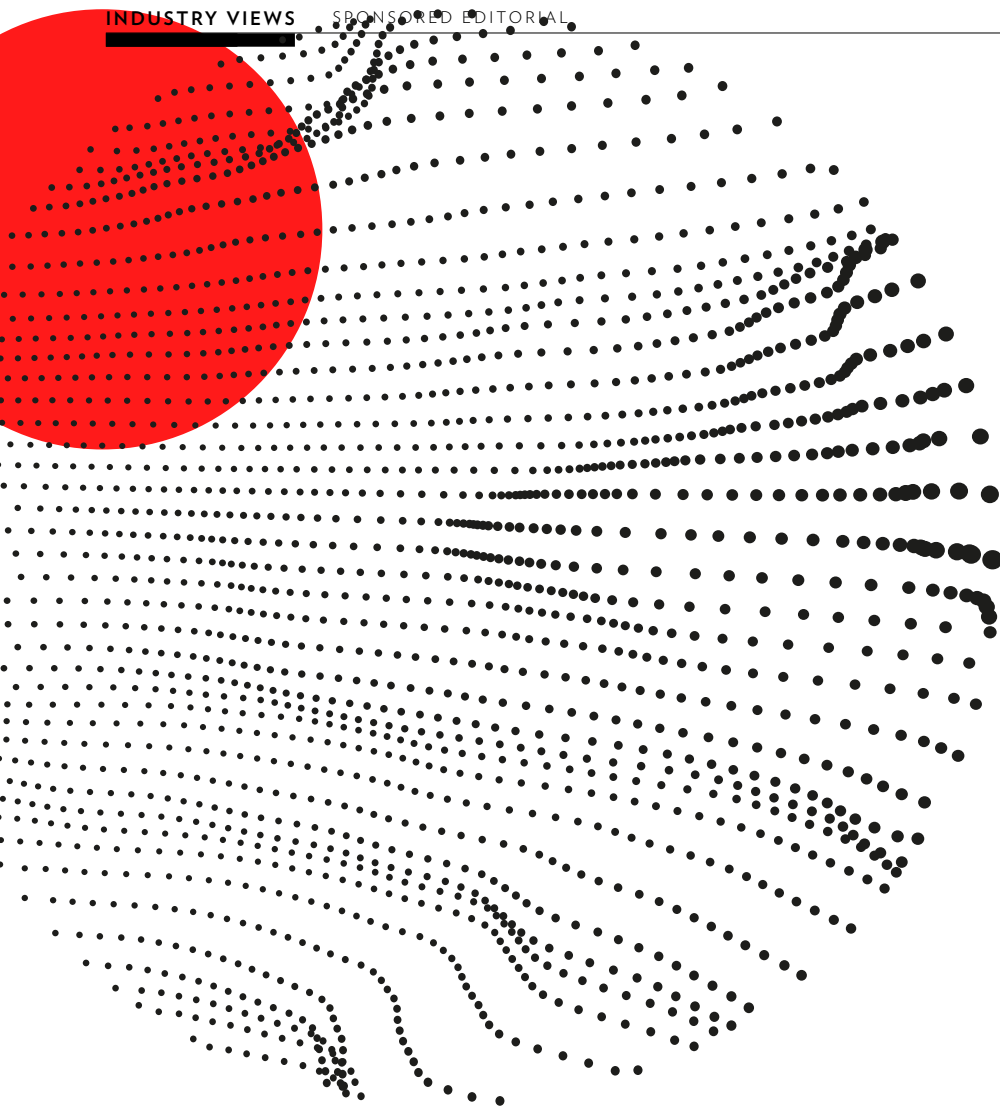
“Covid-19 has clearly focused everybody more on ideas about what it means to work digitally, and

for law firms that includes how they can best plan, execute and manage that work.” HighQ is, of course, a solution designed to help people in law firms to access and share files, data, project progress and insight in a more joined-up and valuable way to grow healthier client relationships, including through demonstration of the greater efficiency such a repository can generate. Cost predictability and control for clients, effective engagement with those clients and new prospects, and effective visualisation to guide actions and improve decisions are all key drivers at play.

New possibilities

In its latest release HighQ 5.4, Kitchener says, a big step change with respect to all of this is the level of integration it now has with the longstanding document automation solution Contract Express. Firms can expect many opportunities to see and do things differently as they manage workload to deadlines and create new channels for stakeholder collaboration.

He continues: “There are things that you can do now that were not possible with either of the solutions on their own. These centre on things that people in law firms or legal teams often do every day, but which are now easier to get done.” For example, a questionnaire form filled in to create a new document, such as a non-disclosure agreement, will now automatically create both a



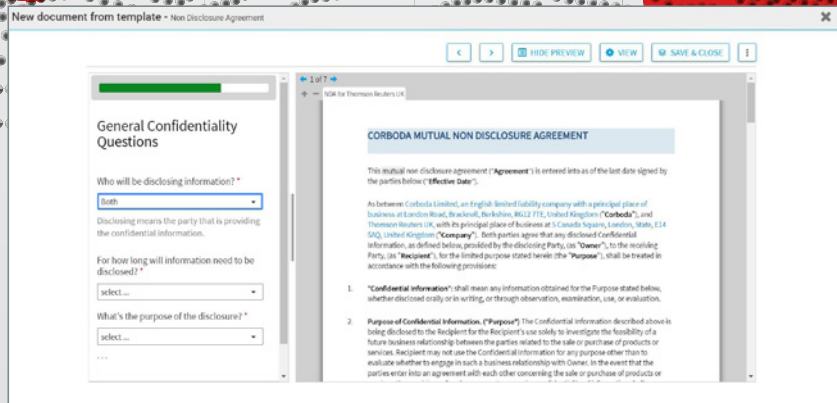
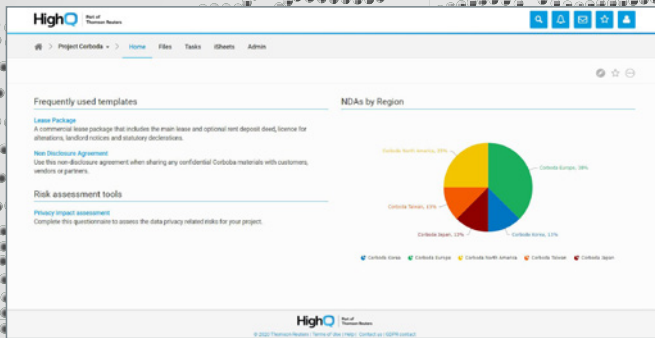
series of tasks and sub-tasks that need to be assigned to people (review, for example) and immediately kickstart the creation of the contract itself.

Cassi Waddy, director, product management at Thomson Reuters, explains there was an integration between the two products before the acquisition, but lawyers then still needed to move between them. Here we have HighQ document automation, powered by Contract Express, as a “cohesive capability within one solution,” she says. “We had feedback from the market that it was great that they talked to each other, but it would be better to work with the two together in the same place.” At the most fundamental level, that “single user experience” is an efficiency itself, of course.

She continues: “All Contract Express documents are now housed within HighQ and, importantly, contract lifecycle and performance data also sit alongside project management data for a fuller picture of pieces of work. It also means that HighQ users can generate suites of ancillary documents for the first time, and allow their clients access to templates in HighQ to generate their own

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Chris Kitchener, vice president, product management, HighQ, Thomson Reuters

documents.” At the same time, corporate legal departments can explore new document workflow efficiencies of their own, such as surrounding approvals. “A non-standard element in a client contract can automatically be routed on to the business’s legal team for approval, whereas an employee could be enabled to create something more standard for themselves,” she explains. In a scenario like that, compliance now isn’t in the position of being the bottleneck, which can often be the case when a queue of documents builds up for review.

Insight in time

As well as the synergies of a single system, and leveraging automation for process efficiency, Kitchener is particularly enthused by the way HighQ 5.4 now enables vast amounts of data to be viewed in new ways. “Whenever we create a new Contract Express document in HighQ, data about it is squirreled away into i-Sheets,” he says. This can subsequently be recalled, meaning that somebody could easily compare the periods of different NDAs, for example. “What matters most for a lawyer is finding the information they need, when they need it, to make great decisions, while

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avoiding unnecessary work that takes up thinking time. We hide the complicated bits, and surface the insight at the right time.”

Readily available information is also important for effective collaboration, among teams internally and with clients. HighQ is organised into ‘sites’, which might be one ongoing matter or a wider project. A site will typically include lists of activities that are involved, the people associated with them, files, blog posts and more, explains Kitchener – perhaps also some financial information about progress taken from the 3E practice management system.

“There are many things you can build, which is already very powerful, but customers told us what they really wanted now was the option to create different landing pages for different groups of people.” One page might contain confidential information, for example, where another only displays what the client most cares about – and this is another new feature in the latest release. “The firm can assign specific user groups, who can then add tasks and files, comment and do versions, audit history, and various other things to collaborate.”

Waddy adds: “On its own, Contract Express is a point solution for document automation, but integrated with HighQ you can co-author, you can open in Word online directly, work and save a new version. Even a small change like that – it wasn’t possible before – creates a big collaborative benefit.”

She also highlights the efficiency boost to document work firms can expect thanks to HighQ’s artificial intelligence engine. This means that you can take a template and kickstart hundreds of new contracts in the case of something like a repapering. “They appear there in somebody else’s folder in the same collaborative workspace, ready for review,” she says.

And Kitchener singles out an example of where AI applied to files or i-Sheets powers data visualisation for more proactive decision-making – there’s a new ‘contract deviation’ display, for example, which shows how closely lawyers’ subsequent contracts resemble a standard template. “We need contracts to be completed quickly and efficiently, but critically also

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Chris Kitchener, vice president, product management, HighQ, Thomson Reuters

accurately,” he explains. “If something deviates from the standard significantly, the chances are somebody is doing something wrong or negotiating badly – either way, it’s costing money.” So, HighQ 5.4 displays a set of these deviations at a glance, and the user can drill down into the details of any one in particular to investigate further. He says: “It’s when we can give people an instant insight it might otherwise take hours or days to uncover that we most empower law firms and legal teams to manage change.”

He’s quick to add that this is only a relatively quick taster of many, many enriched use cases that are there to help firms on their digital journeys in an unprecedented year of change.

“Law firms are generally somewhere on a maturity curve when it comes to digital transformation. It begins with a client intranet and file-sharing, but as you demonstrate more of the things this solution can do, one of the most valuable aspects is the appreciation of how they’re all connected, and the further connections and insights that enables within the firm.”