



**THE  
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In association with:



# Innovation Ambassadors Pilot Programme 2020

Final Report

January 2021



# THE GLOBAL CITY

## Foreword

**Catherine McGuinness,**  
Chair of the Policy and  
Resources Committee,  
City Corporation



It has been exciting to see the success of our pilot Innovation Ambassadors programme. A big thank you to our partners KPMG, who designed and facilitated the programme over the four weeks. Thanks too to our steering committee, mentors, and judges, who all dedicated valuable time to make this programme an enriching experience.

As the programme has underlined, London is a hub of innovation. Our unique mix of fundamental strengths, such as access to talent and the clustering of finance, tech, and legal sectors, means that we are a location where innovation is able to thrive. London's history is full of examples of when it has had to adapt, evolve and re-invent itself. We have seen this once again over recent months. The response to COVID-19 has accelerated changes in the way we work.

We have seen an increase in the adoption of technology. And crucially, a change in mindset on just what is possible. As we look towards the recovery and the future of London, we have an opportunity to build on these positive trends. The UK is already a world-leader in tech-enabled legal services. It is through collaboration, innovation and the adoption of technology that we can create a legal eco-system that is more open, accessible and transparent than ever.

At the City Corporation, we are supporting a range of work to encourage growth and innovation. In October, we published *London Recharged*, which provides a range of recommendations on actions we can take now to support recovery across the UK and protect London's long-term competitiveness. The report highlights how government and the private sector can work together to maintain the UK's competitiveness as a global hub for legal services.

We also host a quarterly LawTech Sounding Board, which explores the opportunities and challenges presented by technology and seeks to drive positive change in legal services delivery.

We aimed through our Innovation Ambassadors pilot programme to foster sustained collaboration within the sector, build digital literacy to support innovation and empower participants to take on the role of an innovation champion within their respective organisations. I truly believe that we have achieved this and more.

The participants and presenters over the four weeks provided extremely innovative insights and ideas throughout and evaluated current practices, challenged existing orthodoxies, and crucially, worked and collaboratively together to find solutions, demonstrated in the incredible creative and innovative presentations in the final workshop.

I would like to thank everyone for taking part in this innovative programme that was a productive, insightful and thought-provoking four weeks for all.

Thank you.



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# Contents

	Page
Executive Summary	<a href="#"><u>4</u></a>
Introduction	<a href="#"><u>6</u></a>
Programme Detail	<a href="#"><u>13</u></a>
The Solutions	<a href="#"><u>23</u></a>
Programme Feedback	<a href="#"><u>41</u></a>
Where Next?	<a href="#"><u>44</u></a>
Participant Profiles	<a href="#"><u>46</u></a>
Appendices:	
• Legal Co-Lab	<a href="#"><u>54</u></a>
• Legaleased	<a href="#"><u>65</u></a>
• The Red Pill	<a href="#"><u>76</u></a>
• Collabify	<a href="#"><u>87</u></a>
• Legaliscious	<a href="#"><u>104</u></a>



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# Executive summary





## Executive summary

The pilot Innovation Ambassadors programme was designed to develop a group of innovation ambassadors who have the ability to spot challenges in legal services delivery, the skills to find and collaboratively develop a solution and the confidence to challenge the status quo to drive innovation within the sector.

The programme brought together a diverse pool of talent from across the legal industry to identify challenges in delivering legal services.

This virtual programme was delivered over a 4 week period and consisted of skills build sessions, insights from technology providers and in-house counsel. A series of collaborative workshops and self-managed sprints enabled participants to develop a solution that solved some of the challenges identified throughout the programme.

These solutions aimed to solve challenges relating to:

- Building the skillset and innovation mind-set needed to deliver high quality, cost-effective legal services
- Solving the gap between those with and without access to legal knowledge to help people and businesses make informed decisions
- Access to targeted data that matters to clients to improve legal service delivery
- Developing new skills to support legal operations in an immersive, engaging format
- Helping in-house practitioners identify where to start when communicating and solving a business problem



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# Introduction

## Programme Vision

For the pilot Innovation Ambassadors Programme, our Vision was to develop a group of innovation ambassadors who have the ability to spot challenges in legal services delivery, the skills to find and collaboratively develop a solution and the confidence to challenge the status quo to drive innovation within the sector. With this, we had the following four objectives:

1. Achieve sustainable collaboration across the legal sector - in-house, private practice, regulatory - to develop potential solutions to common challenges
2. Equip participants with the skills to champion change in the legal sector, leading to service delivery evolution
3. Drive awareness of the 'art of the possible' with lawtech to stimulate creative thinking
4. Encourage digitalisation in the legal sector through the adoption of lawtech, championed by our programme alumni – the Innovation Ambassadors

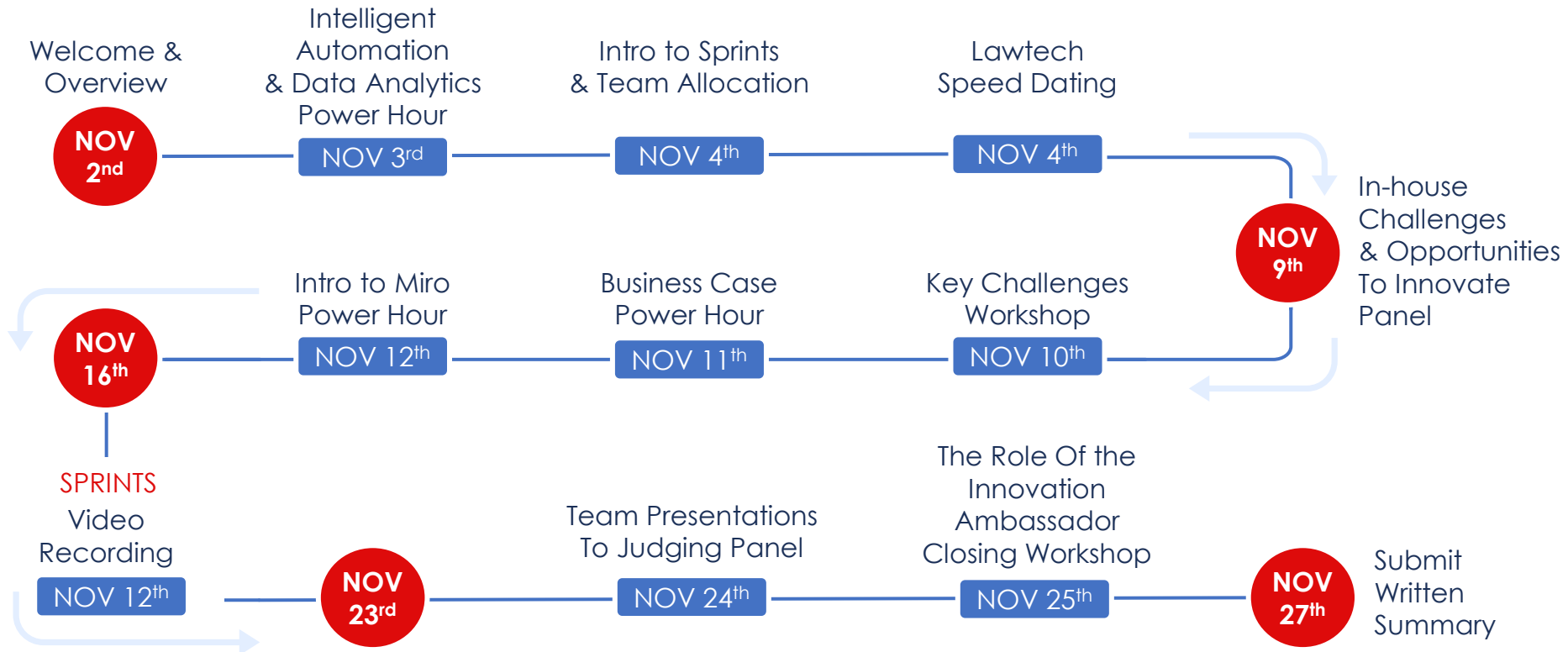
The pilot Innovation Ambassadors programme has demonstrated how much opportunity and enthusiasm there is for transformation in the delivery of legal services. By bringing together a diverse talent pool from across private practice, in-house legal teams and the regulators, we have demonstrated the power of having a growth mindset and true collaboration to build out solutions. Imagine what could be done with this in the market – there is so much potential!



**Nicola Brooks,**  
**Head of Legal Transformation KPMG**  
Pilot Innovation Ambassadors Programme  
Lead



# The Innovation Ambassadors Programme Overview





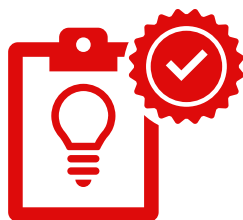


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# The challenges facing the Legal Industry

# Challenges facing the Legal Industry

Throughout the programme, we captured and consolidated the challenges facing the legal sector around innovating legal services delivery. These challenges were sourced from:



The participants' application form to join the pilot Innovation Ambassadors programme



Discussions on the impact of political, regulatory, economic, societal, technological and organisational changes on the type of legal services and the way that they're delivered



Questions raised during the Automation & Analytics, Legal Tech Speed Dating and Business Case 101 Power Hours



Our in-house panel discussion and debate

These challenges were then grouped into six themes, which are outlined on the following 2 pages. Participants could either choose a challenge to solve that had already been identified and discussed or opt to solve a completely new challenge.

# Challenges facing the Legal Industry



## Collaboration

- How can we collaborate for the mutual benefit of our clients?
- How can we achieve continuous improvement across the legal ecosystem to break down silos?
- How can we change an organisation's perception of their Legal function – and by extension, their external counsel?



## The Virtual World

- How can London maintain its position if we work in a fully virtual world?
- How can we deal with the increased globalisation of legal services delivery including regulatory compliance?
- How can we shape regulation, ethics and compliance to support intelligent technologies?
- How can we deliver quicker without compromising quality of legal services delivery?
- How can we change our traditional office structure / locations to deliver services virtually?



## Client-Focused Service Delivery

- How do we balance personalised vs. commoditised services to increase revenue and reduce cost?
- How and what can we empower our clients to self-serve?
- How can we change to become more client-centric in our delivery of legal services?
- How can we deliver 'more for less' – if that's what we're being asked to do?

# Challenges facing the Legal Industry



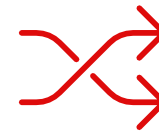
## Data & Analytics

- How can we centralise access to and use of data to support / improve legal service delivery?
- How can we enhance the transparency of our work process / product?
- How can we use data to model the impact of regulation on legal services delivery e.g. Brexit?
- How can we access, use and manipulate data to become more forward-looking?



## Knowledge & Training

- How does legal training for new / junior / experienced legal professionals need to change to support innovation in legal service delivery?
- How can we enhance knowledge management to achieve innovation in service delivery?



## Productivity vs. Innovation

- How can we bridge the disconnect between legal processes and legal tech?
- How can we encourage diversity of thought and inclusive behaviour to drive innovation?
- How do we combat the pressure to get ahead of the technological curve?
- How do we balance progress vs. perfection in innovation?



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# Programme detail





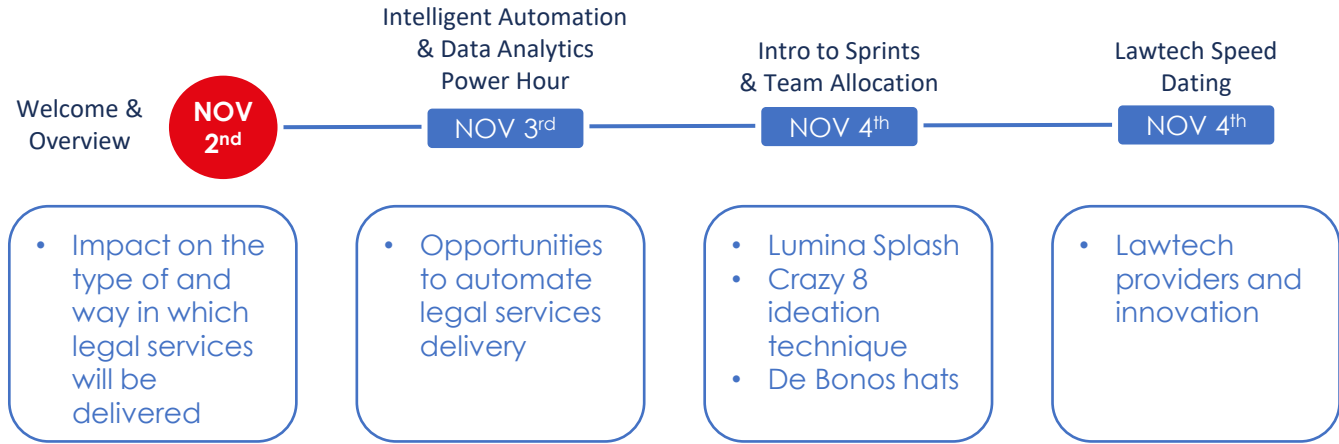
## Week 1: The art of the possible / 01

### Overview

During the first week of the programme, participants applied their understanding of the macro dynamics of the new reality and drivers of digital acceleration to reimagine how legal services will be delivered, as well as how legal teams will work together in the future.

To support digital initiatives, introductory sessions were held on automation, analytics and data, along with a speed dating hour with technology providers in the legal sector.

In light of the virtual nature of the programme, participants were equipped with different tools and techniques to help with remote team management.



### 'PRESTO' drivers discussed during week 1

Political	Regulatory & Legal	Economic	Social & Organisational	Technology
<ul style="list-style-type: none"> <li>Economy vs Health</li> <li>National politics vs Global Co-ordination</li> <li>State Aid</li> <li>Identity and Privacy</li> <li>ESG and Climate change</li> </ul>	<ul style="list-style-type: none"> <li>Consumer protection and the financially vulnerable</li> <li>Reframing corporate governance</li> <li>Redefining the role of the lawyer</li> </ul>	<ul style="list-style-type: none"> <li>Existential pivot for businesses</li> <li>Foreign Direct Investment and investment slow downs</li> <li>Central banking interventions</li> <li>Sector reinvention and ecosystems</li> </ul>	<ul style="list-style-type: none"> <li>Post-Covid new reality</li> <li>Immigration debate</li> <li>Consumer consumption models</li> <li>Climate change</li> <li>Diversity</li> <li>Social Mobility</li> </ul>	<ul style="list-style-type: none"> <li>Digitisation vs productivity</li> <li>Artificial Intelligence (A.I.)</li> <li>Self-service models using tech</li> <li>Data ethics</li> </ul>

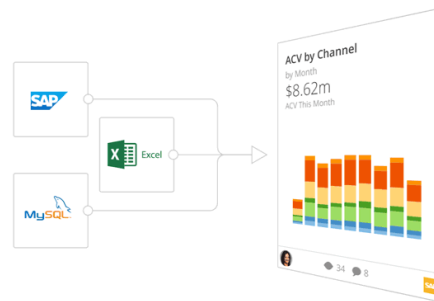
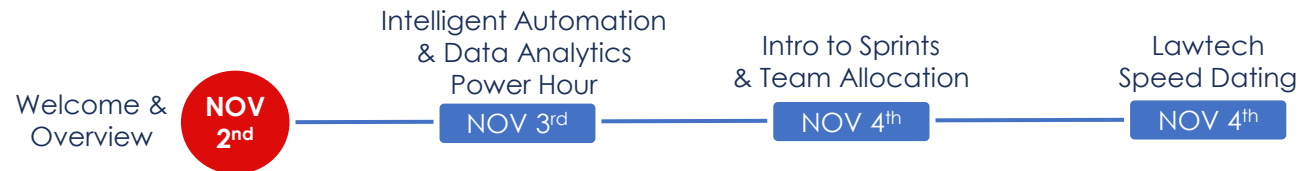
## Week 1: The art of the possible / 02

### Outcomes

By the end of this week the teams had explored a lot of information and concluded on a number of areas including:

- The 5 big predictions for the legal industry
- The most impactful 'PRESTO' drivers on the legal industry
- The biggest opportunities for automation in legal service delivery
- A selection of the technology currently available to support innovation

They also learnt a lot about each other via the Lumina Splash app and how to storm, norm and perform in rapidly formed, virtual teams.



#### 5 Big Predictions:

1. Clients expect a B2C experience
2. Use of proprietary and 3<sup>rd</sup> party data to drive better business outcomes
3. Customer Data Platforms will become the norm
4. Shifting from a fixed mindset to a growth mindset
5. Driving greater diversity of thought

#### Where do you see the biggest opportunity for automation in service delivery?



### Overview

In-house  
Challenges &  
Opportunities  
To Innovate  
Panel

NOV  
9th

Key Challenges  
Workshop

NOV 10th

Business Case  
Power Hour

NOV 11th

Intro to Miro  
Power Hour

NOV 12th



**Mark Gregory**  
General  
Counsel, Rolls  
Royce, plc



**Erica Handling**  
NED on The Board of  
the Government  
Legal Dept



**Mike Elston**  
Chief Counsel, Europe  
& International, BAE  
Systems Air

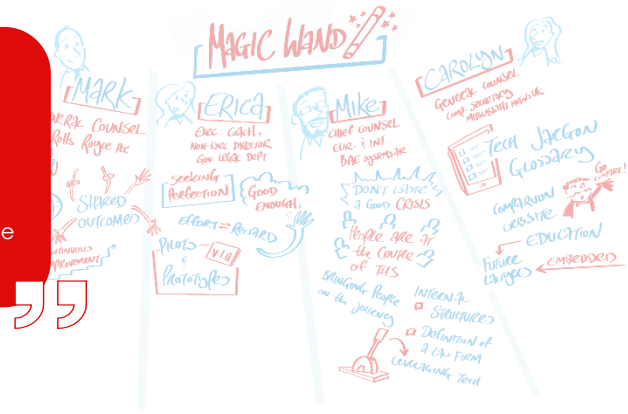


**Carolyn Stephenson**  
General Counsel &  
Company Secretary,  
Mitsubishi Motors UK



The Innovation Ambassadors programme has highlighted how the profession can and must change. The impact of national-scale remote working as a result of the Covid pandemic has further accelerated fundamental changes that were already underway. A secure, adaptable, affordable and effective eco-system of technology solutions will support and enhance the output of the current and future generations of legal professionals

**Mike Elston**





## Week 2: Challenging the status quo / 02

### Outcomes

The teams then participated in an interactive workshop to discuss the challenges that had been identified and start to brainstorm their proposed solution.

They used a variety of techniques to shape their actionable problem statements to take forwards into the sprint week and were supported by their industry mentor.

They also had an introduction to how to build a business case, supported by industry Subject Matter Experts, as well as training on a virtual collaboration white board that they subsequently used in their sprint week.

In-house Challenges & Opportunities To Innovate Panel

NOV 9<sup>th</sup>

- The challenge themes that the teams chose to take forward were collaboration and client focused-service delivery



Key Challenges Workshop

NOV 10<sup>th</sup>



Business Case Power Hour

NOV 11<sup>th</sup>

The session covered:

- What is a business case?
- What's included?
- Financial Assessment
- Communicating benefits and ROI
- Developing the case for change
- Becoming pitch ready

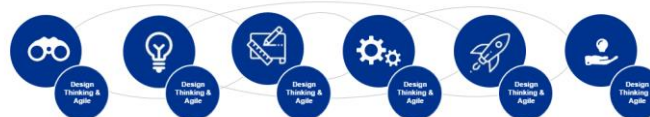
Intro to Miro Power Hour

NOV 12<sup>th</sup>

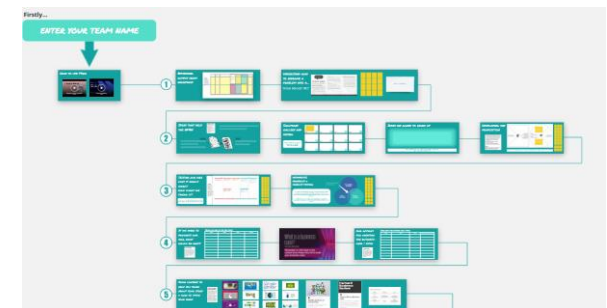
Participants learned how to use Miro, the virtual collaboration white board

### Example solution design approach

Identify Opportunities   Create Potential Concepts   Validate Concepts   Develop Working Solutions   Deploy To Realise Value   Run & Evolve To Optimise Solution



### Examples of the problem statement templates





## Week 3: Breaking new ground / 01

### Overview

Sprints

NOV 9th

Solving the Challenge

Creative Canvas

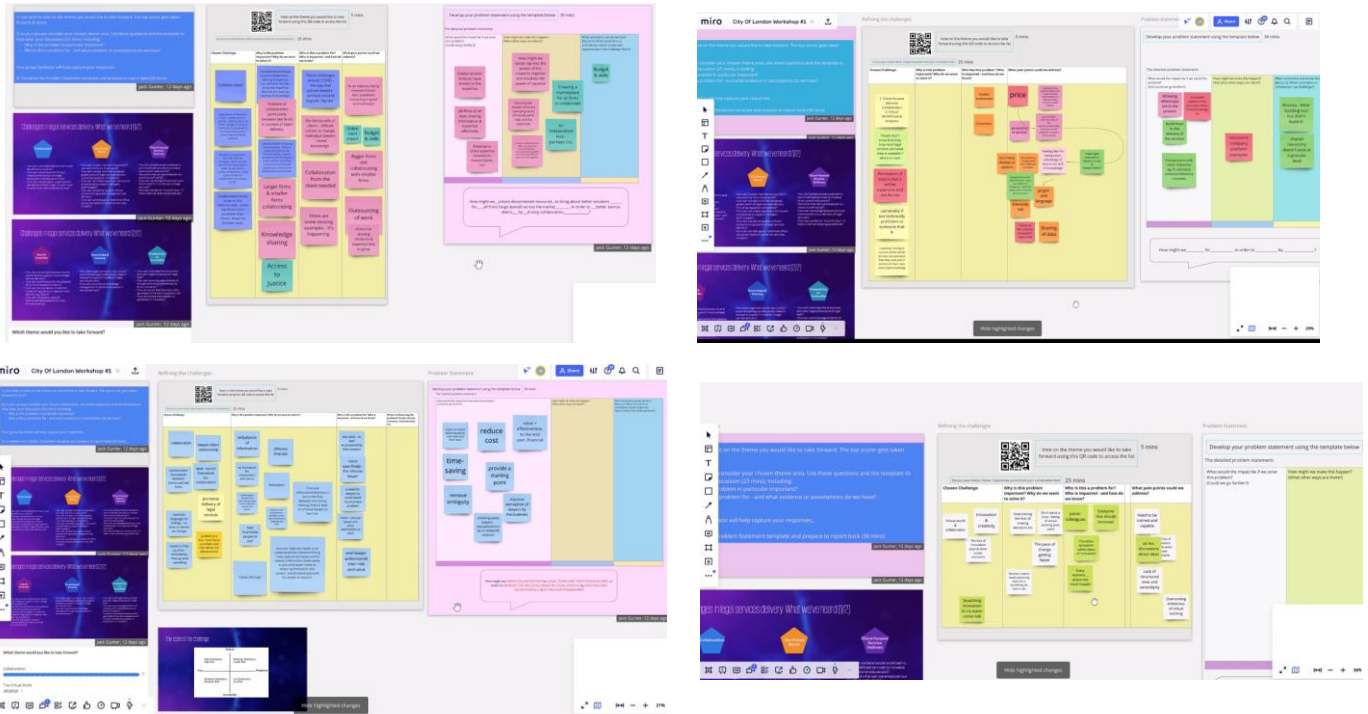
Feasibility

Action Plan

Recording Presentations

NOV 20th

### Excerpts from the team Miro boards









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## Our judging panel



**Tom Sleigh**

Chair of the Barbican Centre Board and Vice Chair, Policy and Resources Committee, City of London



**Victoria Thompson**

Director, London Blockchain Foundation, Founder, Curatrix and Founder & CEO, Fouraid



**Sid Welham**

Chief Operating Officer, HFW



**Craig Bird**

Business Applications Specialist, Microsoft



**Jana Blount**

Change Council Chair, DLA Piper

“

What a fantastic example of industry innovation. Legal specialists giving up their time to come together for the benefit of community. Very professional content and delivery by all teams!

”

“

I loved how people worked hard to deliver great presentations and ideas on challenges that most, if not all, of legal can identify with. I could tell that people really invested time and effort into understanding the challenges in the legal industry and coming up with possible solutions. Would love to see some of these put into action!

”



## What the panel were looking for....

### Business value

Can it save money? Can it make money? If so, how?

### Pragmatism

Is it realistic and can it be implemented relatively easily?

### On task

Does it actually address the challenge set?

### Scalability

Can the idea scale?

### Transformative/disruptive

Does the idea transform the legal / lawtech industry or shift the disruption dial?

### Wider benefits

Does it have a commercial and societal benefit?

### Innovative

Does the idea present something that hasn't been thought of before?

### Creative/ inspiring

Is the idea something to feel excited about? Does it have a wow factor?

### Obstacles

Have the team thought through the barriers to their idea (regulation, technology, appetite, etc.). And how to overcome them?



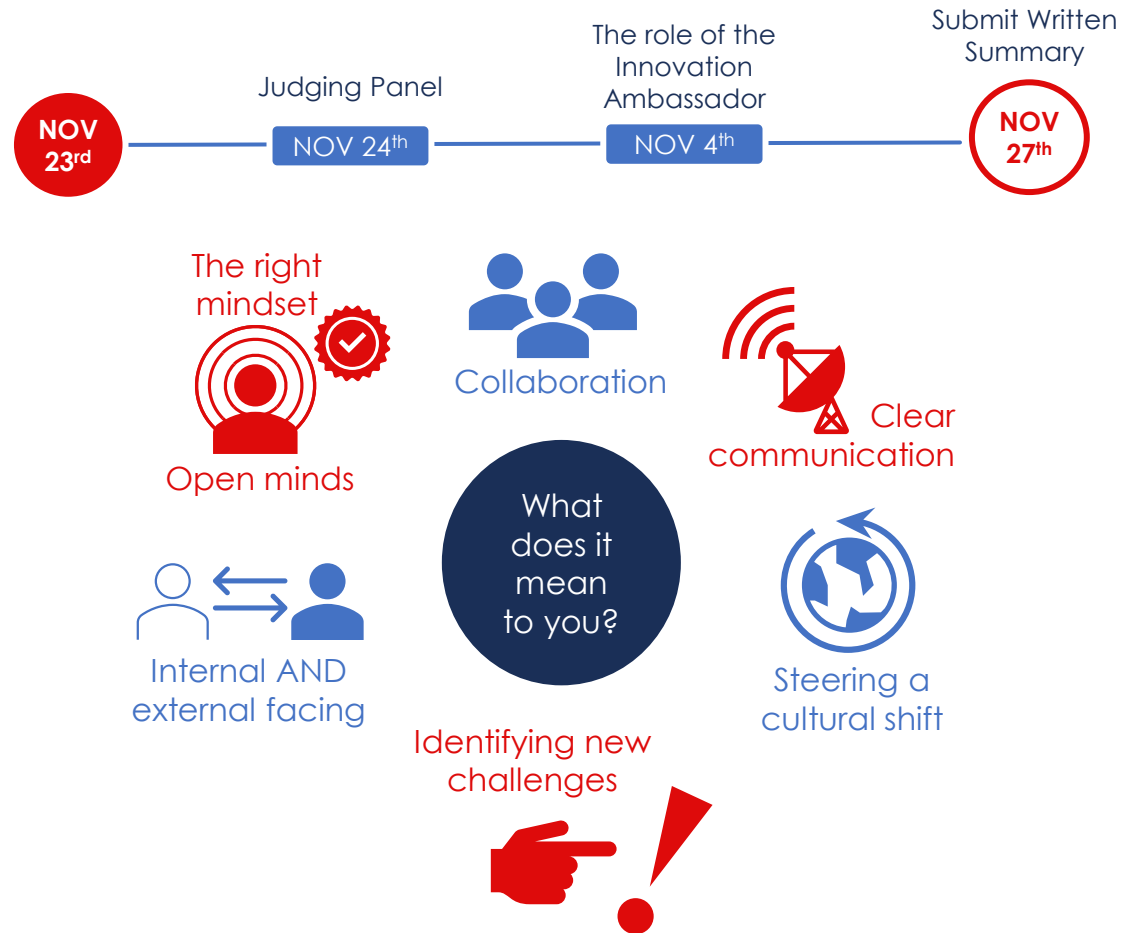
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# Week 4: Becoming an Innovation Ambassador

## Overview

Our final session closed out the programme with a focus on:

- What does the role of an Innovation Ambassador really mean?
- How are you going to support each other moving forward and keep the network going?
- Programme feedback





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# The solutions





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## Solution executive summaries

### Legal Co-Lab

There is untapped talent across the legal ecosystem and beyond. Legal service providers, educators and regulators are working in silos. The legal sector needs to work together to produce a strong pipeline of legal, technical and commercial professionals who are properly equipped with the necessary skills and innovation mind-set to deliver high quality, cost-effective legal services that clients are entitled to expect.

### Legaleased

Solving the gap between those with and without access to legal knowledge by using a 'plain language' initiative to help people and businesses make informed decisions.

### Legaliscious

Law firms have data but it is siloed or without necessary architecture and data literacy to use it. Our solution uses an integrated platform to track and analyse targeted data, and present it in a clear way through an online dashboard, to track variables clients and firms have specifically identified of interest.

### The Red Pill

A reality-series and set of challenges that acts an immersive, engaging and accessible way for in-house counsel to learn and develop new skills in legal operations.

### Mind the Gap / Collabify

A toolkit to address common user challenges, combine resources from industry, and edit everything with a common language and tone in order to help in-house practitioners identify where to start when communicating and solving a business problem.



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**And the winner was....**

# Legal Co-Lab

“

This is a great idea and we need this to exist in the UK.

”

**Victoria Thompson**

*Director, London Blockchain Foundation,  
Founder, Curatrix and Founder & CEO,  
Fouraid*

“

Addresses a very current, real issue with a very creative and collaborative idea that the industry clearly needs.

”

**Jana Blount**

*Change Council Chair, DLA Piper*

### Team list

Christie Guimond  
Christopher Cartwright  
Daniel Solomon  
Gemma Mainland  
Mark Parr  
Megan Swart  
Michael van Breda  
Mike Kennedy  
Rachel Coleman  
Rikin Morjaria  
Sapheen Meran





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# Legal Co-Lab Executive Summary

There is untapped talent across the legal ecosystem and beyond. Legal service providers, educators and regulators are working in silos. The legal sector needs to work together to produce a strong pipeline of legal, technical and commercial professionals who are properly equipped with the necessary skills and innovation mind-set to deliver high quality, cost-effective legal services that clients are entitled to expect. Our solution to unlocking this talent and addressing the innovation skills-gap is Legal Co-Lab. Legal Co-Lab is a cross-industry project to equip students, lawyers, technologists and other industry professionals with the key skills they need for the future, and enable them to expand these skills throughout their professional lives. Legal Co-Lab has 3 core elements:

## **Community**

Legal Co-Lab will bring together a working group from across the legal ecosystem, collaborating to identify the future skills and develop the educational standards required for professionals working in the legal industry of the future

## **Courses**

A series of micro-courses designed to equip users with the key future skills identified by our working group will be delivered through an independent web-based platform

## **Collaboration**

Users of the platform will form its free online community, accessible to all. Members of the community will be encouraged to use the platform to collaborate together to solve challenges facing the legal industry posed by other members, and drive the continuous improvement of Legal Co-Lab.

Our approach aims to consolidate efforts across the industry to tackle the significant challenges firms and in-house teams encounter when upskilling their staff for the future. We know that the legal industry needs Legal Co-Lab. Our research and validation evidenced a real need and desire for a platform that could bring the legal ecosystem together in order to equip legal professionals with the key skills required in the future. We are excited about the opportunities Legal Co-Lab presents for professionals to explore and develop to ensure the legal industry recruits, retains and develops the very best talent!



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## Legal Co-Lab Commentary

### Judges comments

This is a great idea and we need this to exist in the UK.

**Victoria Thompson**

It was clear to see the value for the industry and the acceleration of expertise it would offer to firms

**Sid Welham**

### City of London comments

Legal Co-Lab managed to create a solution that responded to a number of challenges discussed during the course of the programme. This included bringing in new talent to the legal sector, collaboration and access to digital ideas and solutions. It is relevant to a wide group of stakeholders and has real potential.



**Mentor**  
**Tracey Summerell**

Managing Practice  
Development  
Lawyer, Dentons LLP



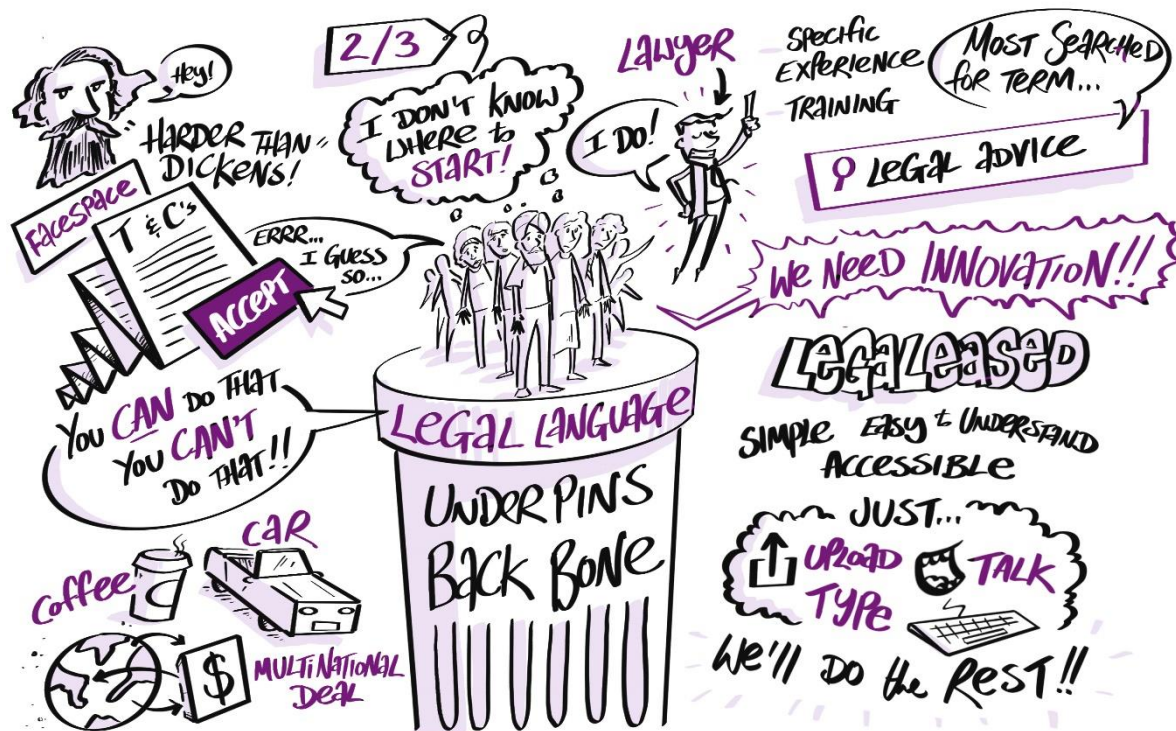
I'm absolutely delighted for the team. They worked so hard and in such a practical, collaborative, open-minded, mutually respectful way – it was a pleasure to work with them. I really hope we can get the project off the ground!





### Team list

Alex Cravero  
Ausilia Matraxia  
Cynthia Ma  
Ellen Catherall  
James Grice  
Jatinderpal Loyal  
Sara Collins  
Sergey Grekov  
Stephanie Barrett





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# Legaleased Executive Summary

Highly commended – social impact

Legal language is complex and confusing. Legal terms govern virtually every interaction in our daily lives, whether as a consumer or a business. Yet, even just understanding those legal terms requires specialist training and expertise. As a result, non-legally trained individuals must either find and hire expensive professional lawyers just to interpret legal language or take the risk of signing up to legal terms without any understanding of their rights and obligations. That is if they are able to identify from the outset the kind of legal service they need to engage, and the complexity of their issue to be resolved.

Legaleased aims to solve the gap between those with and without access to legal knowledge by using a 'plain language' initiative to help people and businesses make informed decisions.

- Even if the individual wants to then it is hard to find lawyers and obtaining responses to discreet queries is difficult and costly.
- This is unfair and unsustainable. The SRA in their report following the Legal Access Challenge said: The ability of people to defend and enforce their rights, is the backbone of a well-functioning society and economy. But research shows that too many individuals and small businesses struggle to access expert legal advice when they need it. This can mean the difference between someone losing their job, home or family; or a business succeeding or failing.
- The gap between those with access to legal knowledge and those without access will continue to widen unless something is implemented to bridge the access gap. We think that this is further hindered by not being able to understand complex legal jargon.
- We also know that nothing has changed to improve the accessibility of legal services for 10 years. The LSB in their November 2020 report, "The State of legal services", stated that "...it continues to be difficult for people to know when they have a legal problem and to engage with the legal services market and shop around." Legaleased, delivers on all those fronts.





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# Legaleased Commentary

Highly commended – social impact

## Judges comments

Fantastic proposition that empowers people and businesses helping demystify Legal. Loved the persona led journey.

**Craig Bird**

I think the idea itself is a great aspiration and I would LOVE if this were possible for access to justice.

**Jana Blount**

## City of London comments

A lack of transparency around legal advice and language is a significant blocker to individuals and businesses accessing justice. An increased use of plain language has the potential to radically transform how people interact with legal services.



**Mentor**

**Christopher Tart-  
Roberts**

Chief Knowledge &  
Innovation Officer,  
Macfarlanes



I thoroughly enjoyed being involved and, from the feedback I've heard from participants, it was really well received by those taking part. A big thanks to COL for making it happen – I know it's taken a lot of hard work, and some creative thought to get over some of the practical challenges given current circumstances, but really worth it.

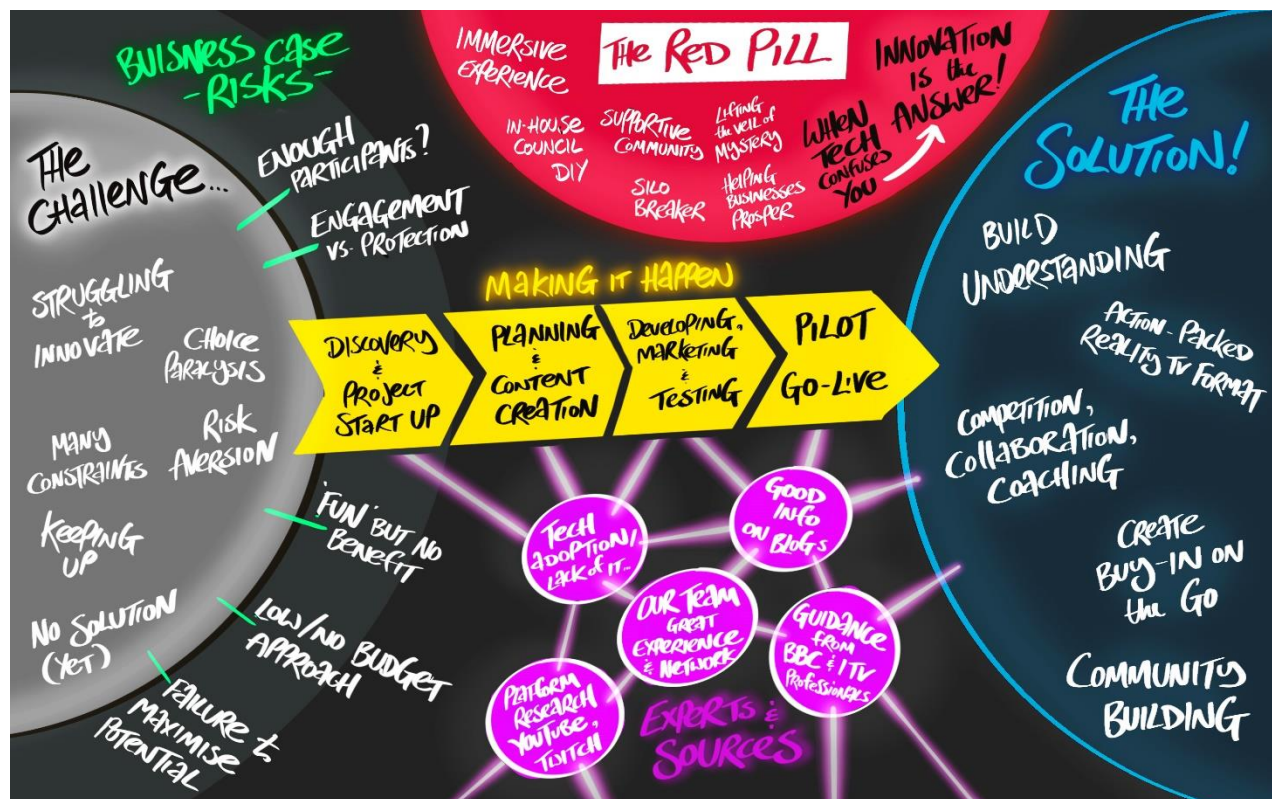


## The Red Pill Vision

Highly commended - creativity

### Team list

Aleksandra Wawrzyszczuk  
Caoimhe Powell  
Christian Fahey  
Erika Pagano  
Ian Jeffery  
Julie Farley  
Philip Alexander  
Sophie Newbould  
Sophie Sheldon  
Warren Davis







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# The Red Pill Executive Summary

Highly commended - creativity

The Red Pill is an immersive experience, providing in-house counsel with a mental toolkit to DIY their legal operations. This reality-series sets challenges in an immersive, engaging and accessible way for in-house counsel to learn and develop new skills in legal operation. It creates a supportive community of problem solvers, breaking down silos in the legal ecosystem and lifting the veil of mystery surrounding the profession. We save GCs from legal-tech vertigo so businesses can prosper. The Red Pill – when tech confuses you, innovation is the answer.

- We want to help SMEs - initially focusing on GCs with a small team (1-5 people) in London.
- There are so many issues for small businesses to deal with, including remote working, uncertain future, regulation changes, developing technology and Brexit that GCs and their teams can get overwhelmed.
- This group of people has real challenges with harnessing their resources and skills to solve problems as there are so many options available to them and often limited time or understanding to really assess what is the best solution.
- The inability to choose or identify a solution can lead to a range of problems including, spending money on solutions that won't solve the problem, stagnation in teams, the business losing out on opportunities due to delay and members of legal team suffering from overwork and burnout.
- People struggling with time and knowledge need an engaging and easily accessible way to learn and develop skills to assess solutions and apply them to the problems they experience.





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# The Red Pill Commentary

Highly commended - creativity

## Judges comments

So much fun and I loved the energy and passion the team brought to this idea. Too often, legal overlooks the simple motivator to innovation of "fun." This took advantage of that and run with it. I fully support the idea that innovation is the solution/answer not technology.

**Jana Blount**

Another good idea, but for me the challenges with the volume of work required to bring this together in an agile way and the value of the specific output for the wider community did not quite reach the level of the winners.

**Craig Bird**

## City of London comments

A great suggestion and novel approach to unlocking innovation for both the participants in the reality show and the viewers. Placing people in a realistic challenge scenario could have a really positive impact on their ability to adapt and approach problems differently.



**Mentor**

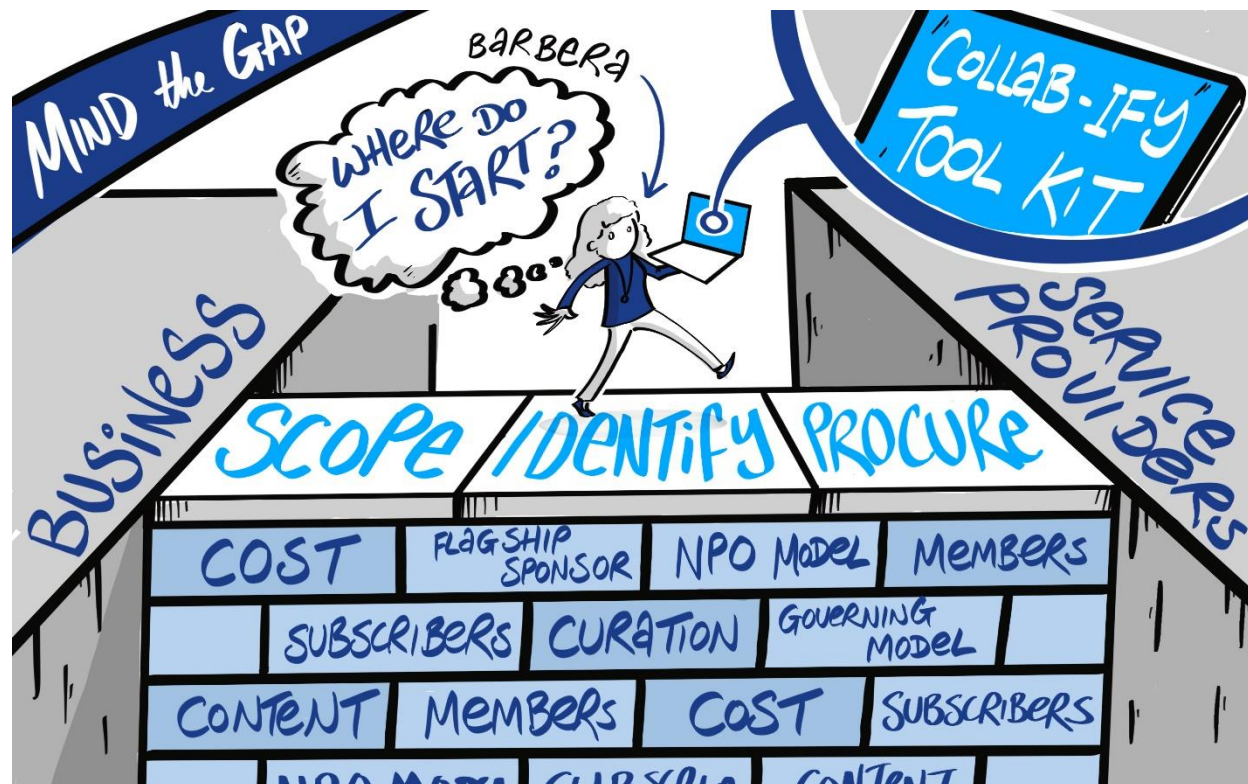
**Lucy Shurwood**

Partner (Financial  
Services), Pinsent  
Masons

# Mind the Gap / Collabify Vision

## Team list

Abilash Unny  
Andrew Dunkley  
Jeremy Hopkins  
Kate  
Perevoshchikova  
Kushal Gandhi  
Lara Quelch  
Rhys Edwards  
Sarah Blair  
Tammy Evans  
Theresa Yurkewich  
Hoffmann







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# Mind the Gap / Collabify Executive Summary

We heard consistently from the in-house panel guests that effective collaboration in the legal ecosystem is sadly lacking. Clients are time-poor and when faced with a sector which is knowledge-rich need a better way of gathering, distilling, and processing information to solve each problem; a requirement on both sides. There are gaps in understanding how to frame a problem, awareness of resources already available, between lawyer and client in client-focussed service delivery, and in the visualisation of the end product.

- These gaps prevent legal services delivery from being efficient and effective. They diminish wellbeing within the profession and leave both the client and the lawyer unhappy with results. This negatively affects the in-house practitioner in the service they can deliver to their business clients, and negatively affects the reputation of the legal profession.
- With COLLABIFY, we want to address this problem and incentivize collaboration among in-house practitioners, law firms, legal services businesses, technology providers, and others in the ecosystem. We will do so by creating a comprehensive toolkit designed to address common user challenges, aggregating resources from industry, and editing the content to fit a common language and tone. The toolkit will help in-house practitioners in three stages: a) scoping their problem, b) identifying useful resources, and c) procuring the most effective services.
- The toolkit will serve as a two-way service to enable users to 'mind the gap' in collaboration and communication and then effectively bridge that gap. It will provide in-house practitioners with a roadmap of where to begin in solving their business problem, and it will provide lawyers with a platform to showcase their expertise. The toolkit will be populated by industry, for industry and can serve as a way to better understand each other's challenges in order to deliver a better product.



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## Mind the Gap / Collabify Commentary

### Judges comments

The comment that resonated most was that sometimes GCs need help formulating what the right question or challenge is from the start. I agree.

**Craig Bird**

Needed to have a clearer communication of product/service and how this will be commercially viable.

**Victoria Thompson**

### City of London comments

Collaboration has been such a major theme of the programme it's fantastic to see so many solutions looking to address this issue. The Collabify toolkit sets out a great concept for bringing together in-house counsel and lawyers in private practice to learn from each other.



**Mentor**

**Catherine Bamford**

Legal Engineer, CEO  
and Founder,  
BamLegal



What an incredible programme! I was honoured to be a mentor in a scheme that brought the best minds in the legal world together to design solutions for the future. Everyone learnt so much from each other. A truly valuable experience.



### Team list

Alessandra Yen  
 Alex Hewitt-Clay  
 Alex McPherson  
 Alexandra Cardenas  
 Alexis Alexander  
 Alistair Wye  
 Dan Simpkin  
 Emma Walton  
 Thomas Hinton  
 Tracy Jones  
 William McSweeney





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# Legaliscious Executive Summary

The business world is placing an ever-increasing premium on clear, accessible, data-driven insight. Law firms are uniquely placed to capture and analyse the necessary data to deliver such insights to their clients. This data is available, but it is often siloed and those in a position to extract it are sometimes not equipped with the necessary architecture and data literacy to do so.

- Our proposed solution would provide an integrated platform that tracks and analyses targeted data and presents it in a clear and intuitive way via an online dashboard. The solution would only track variables that clients and law firms have specifically identified as of interest, and so would avoid amassing deep pools of data with limited utility. The solution would seek to link existing products to leverage powerful technologies that are already in use and lessen the onboarding burden for its users.
- By leveraging these existing products, we would limit the initial cost outlay, but we would not remove it entirely. Initial funding would still need to be secured but this would only be necessary in the early stages of the project as once the solution is launched it will begin generating revenue of its own. Law firms that see the value in offering something more to their clients and unlocking data-powered insights on their own operations, would subscribe to the solution and pay a fee for doing so. Savvy clients will begin to insist that their external advisors use this technology, thus accelerating adoption and contributing to the financial stability of the project.
- Law firms can add real value to their clients by presenting useful data transparently, proactively and succinctly. Clients would benefit by being able to use that data to make more informed commercial decisions, including those relating to their legal spend. The legal industry until now has been operating in a data desert relative to comparable industries. The cost of continuing with this approach is already manifesting in inefficient processes that cannot be usefully measured, benchmarked or systematically improved. Our solution seeks to change that.





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## Legaliscious Commentary

### Judges comments

I agree that the world of data needs to be brought into legal or vice versa. There is so much that law firms are sitting on that is not utilised in a meaningful way to add value for our clients. So great idea grabbing on to that and thinking about what a client would deem useful data to solve a client problem of proving their own value to their business.

**Jana Blount**

### City of London comments

Data access and analysis is core to innovation and the digitalisation of any sector. The ability to open up law firm and client data in the way suggested by Legaliscious could have a profound impact on the ability of products to develop and respond to market needs.



**Mentor**

**Chris Grant**

LawTech Director,  
Barclays Eagle Labs



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# Programme feedback



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## Programme feedback

“

The City of London Corporation Innovation Ambassadors is an excellent programme to inspire tremendous team spirits in legal services delivery innovation

**Cynthia Ma, Legal Director, Ashfords LLP**

”

The programme received an average of 8 out of 10 on how likely participants would be to recommend it.

**8/10**

“

The Innovation Ambassadors programme was hugely refreshing and inspiring in equal measures; it has opened up my eyes fully to Law Tech, London's role and the many opportunities in Legal Services to pivot and adapt client service, without compromising on culture and values

**Alex McPherson, Founder & Partner, Ignition Law**

”

84% rated the programme 'excellent' or 'very good'.

**84%**

The agenda was really rich - the combination of insights and tools was hugely valuable. Enjoyed the collaboration with my team who were amazing and it was great to develop close working relationships with them and hear their perspectives.

Following our presentation, I shared my team's idea with both the Head of our Solutions Team and our COO and both agreed that it's a fantastic idea that would make a massive difference to the legal industry.

Working with my team was a great experience - we were able to channel creativity and learn from each other. I'm still impressed by how quickly we managed to build rapport and deliver results. The concept of the programme in itself is very good.

We only agreed our idea on the Monday of sprint week, and what we were able to produce in time for the video on Friday was amazing, and I was extremely proud of what we achieved.

The activities and the design have given me the confidence to push harder on all fronts and drive my agenda with more senior people in the organisation.

The cohort of people was excellent - everyone was bright and 'got it'. I hope to be able to carry the network forward.

The best bit was the honest panel session with the GC's was genuinely useful - this kind of access is normally hard to get, and is the sort of thing programme needed more of.

Thought it was really well run, really good community involved and some great tips. Only lost a star as it's a big time commitment.





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## Programme learnings in the words of the participants

“Not enough time with other people or as much networking with the full group as I'd hoped”

“More time was needed to refine our presentations!”

“More time to construct an MVP or POC”

“Set one challenge to see how each group would approach it”

“The legal speed dating was the least useful session”

“More understanding of the range of tech available”

“Extend it by a week or two to give more creative breathing space”

“Less silo'd thinking initially coming up with ideas across lots of themes vs focusing on one”

“The accessibility of this being virtual was great – I could only be involved because it was remote”

“Shorter course but full-time days so you're completely focused”

“More cutting edge content”

“Better expectation management on the Sprint and time needed”



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# Where next?



## Recommendations and next steps



### Future Programmes

As a pilot programme the next step is to consider what future iterations of the programme might look like. This includes consideration of who the target audience would be and the funding alternatives for running any further versions of it. Running the programme in a virtual format made some elements of participation easier and others more difficult. A hybrid model would seem the perfect solution and something that will hopefully become possible as we move through 2021.

### Supporting the Innovation Ambassadors Network

There were huge levels of enthusiasm from the participants about creating and continuing this network. In addition to providing opportunities for further in-person networking when restrictions allow, we will also explore what further workshops, panels or other events might benefit and continue to stimulate the Innovation Ambassadors network on their innovation journey.



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# Participant profiles



## Participant Summary

### Participants

---

**55 participants**  
**+ 5 mentors**  
**+ 5 judges**  
**+ 5 lawtechs**  
**+ 4 General Counsels**  
**= 51 organisations**

### Experience

---

**2 – 20 years of experience**

### Roles

---

**Private practice**  
**In-house**  
**Legal operations**  
**Policy or regulation**  
**IT**

### A Snapshot

---

- 35 Large / Global firms: (White & Case, Ashfords, Macfarlanes, Pinsent Masons, CMS, Addleshaw Goddard, Latham & Watkins, Slaughter & May, HSF, Freshfields Bruckhaus Deringer, Lewis Silkin, Norton Rose, Thorntons)
- 3 Mid-sized firms: (Field Seymour Parkes, Blaser Mills)
- 4 Small firms: (Ignition, Independents)
- 6 In house (Monzo, Oaktree Capital, Liberis, Inmarsat)
- 2 Legal Services Businesses (Disrupters) (Deloitte, KPMG)
- 4 Regulatory / Professional Body (The Law Society, SRA)
- Also involved: Microsoft, Amazon, DLA Piper, Dentons, BAM Legal, Bryter, Rolls Royce, BAE Systems, Government Legal Services



## Thank you to our participants

Name	Organisation	Name	Organisation	Name	Organisation
Abilash Unny	Ashurst	Ausilia Matraxia	A2Dominion Housing Group Ltd	Erika Pagano	Simmons Wavelength (Simmons & Simmons)
Aleksandra Wawrzyszczuk	University of East London	Caoimhe Powell	Herbert Smith Freehills	Gemma Mainland	Ashurst LLP
Alessandra Yen	Freshfields Bruckhaus Deringer	Christian Fahey	Inmarsat	Ian Jeffery	Lewis Silkin LLP
Alex Cravero	Herbert Smith Freehills	Christie Guimond	White & Case LLP	James Grice	Eversheds Sutherland LLP
Alex Hewitt-Clay	CMS Cameron McKenna Nabarro Olswang LLP	Christopher Cartwright	Oaktree Capital Management (UK) LLP	Jatinderpal Loyal	Solicitors Regulation Authority
Alex McPherson	Ignition Law	Cynthia Ma	Ashfords LLP	Jeremy Hopkins	Field Seymour Parkes LLP
Alexandra Cardenas	The Law Society	Dan Simpkin	Macfarlanes LLP	Julie Farley	Herbert Smith Freehills LLP
Alexis Alexander	Liberis	Daniel Solomon	Lewis Silkin LLP	Kate Perevoshchikova	White & Case
Alistair Wye	Latham & Watkins LLP	Ellen Catherall	Addleshaw Goddard	Kushal Gandhi	CMS Cameron McKenna Nabarro Olswang LLP
Andrew Dunkley	Herbert Smith Freehills	Emma Walton	Slaughter and May	Lara Quelch	KPMG LLP





## Thank you to our participants

Name	Organisation	Name	Organisation	Name	Organisation
Mark Parr	HFW LLP	Rikin Morjaria	Freshfields Bruckhaus Deringer LLP	Stephanie Barrett	Herbert Smith Freehills
Martha Grekos	Martha Grekos Legal Consultancy Limited	Sapheen Meran	Macfarlanes LLP	Tammy Evans	Ignition Law Legal Services
Megan Swart	CMS Cameron McKenna Nabarro Olswang LLP	Sara Collins	Norton Rose Fulbright LLP	Theresa Yurkewich Hoffmann	City of London Corporation
Michael van Breda	Herbert Smith Freehills	Sarah Blair	Thorntons Law LLP	Thomas Hinton	Addleshaw Goddard
Mike Kennedy	Addleshaw Goddard	Sergey Grekov	LCIA	Tracy Jones	Blaser Mills Law
Philip Alexander	CMS Cameron McKenna Nabarro Olswang	Sophie Newbould	Athensys & Newboulds Solicitors	Warren Davis	Solicitors Regulation Authority
Rachel Coleman	Pinsent Masons LLP	Sophie Sheldon	Simmons + Simmons LLP	William McSweeney	The Law Society
Rhys Edwards	Monzo				



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## Special thanks to our mentors and judges

Name	Organisation	Name	Organisation
Tracey Summerell	Dentons	Craig Bird	Microsoft
Catherine Bamford	BAM Legal	Tom Sleigh	Amazon / City of London
Christopher Grant	Barclays Eagle Labs	Jana Blount	DLA Piper
Lucy Shurwood	Pinsent Masons	Sid Welham	HFW
Christopher Tart-Roberts	Macfarlanes	Victoria Thompson	London Blockchain Foundation



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## Special thanks to our programme contributors

Name	Organisation	Name	Organisation
Carolyn Stephenson	Mitsubishi Cars	Sam Spivack	BRYTER
Erica Handling	GLS	James Quaile	BRYTER
Mike Elston	BAE Systems	Benjamin White	Crafty Counsel
Mark Gregory	Rolls Royce Plc	Oli Ward	Microsoft
Sarah Maclean-Morris	Miro	Craig Bird	Microsoft
Stacey Andrews	KPMG	Adrian Hubbard	KPMG
		Paul Nelmes	SirionLabs
		Devinderjeet Singh	SirionLabs



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## The KPMG delivery team

INNOVATION AMBASSADORS 2020:  
Leading change for the future of legal



**Nicola Brooks**  
Head of Legal Transformation



**Lucy Powell**  
Legal Transformation



**Martyn Osmundsen**  
Data, Analytics & Automation



**Ashley Garnett**  
Legal Technology



**Penny McLoughlin**  
Lead Facilitator



**Anna Penrose**  
Co-Facilitator



**Jack Gunter**  
Tech Delivery



**Michael Norejko**  
Data, Analytics & Automation,  
Business Case Power Hours



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# Appendices



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# Legal Co-Lab





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## Legal Co-Lab Setting the scene

We are in unprecedented times. The COVID-19 pandemic is impacting people, businesses and entire industries on an unparalleled scale. The legal industry is no exception and is faced with having to deal with this crisis alongside numerous other challenges including access to justice, mental health, Brexit and digital transformation. Does the legal industry have the skills to address these challenges? Perhaps. However, there are over 233,000 UK legal professionals, many of whom have no training in competencies like the application of technology to legal services, project/process management and legal design. Legal professionals are notoriously reluctant to adopt new ways of working. Non-legal professionals often have difficulty accessing the profession or are difficult to attract. Key stakeholders across the UK agree that there is a clear skills gap. If this gap is not addressed, the legal industry risks having a workforce which is insufficiently equipped to deal with the challenges it faces and to deliver what clients are demanding in terms of quality of service and value-add. Addressing the skills gap and refocusing the sector offers the opportunity to build an innovative and global leading workforce through:

legal professionals who are better equipped to operate effectively in the digital workplace and more inclined to innovate through new ways of working

increased access for professionals from non-legal backgrounds who bring a wide variety of important skills to the legal ecosystem

We recognise that there are a variety of courses, initiatives and communities which already exist. However, legal service providers, educators and regulators are working in silos and there is no consensus on what the key skills are making it difficult to recruit and/or upskill.



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## Legal Co-Lab

### Setting the scene

#### Universities

...some LLB courses offer optional modules covering key competencies outside of traditional law but careers advice remains focused on the traditional legal career paths. There is a range of courses covering other subjects which are relevant to the legal profession but without a clear bridge to the legal industry. For those with a particular interest, there are also a number of courses on specific subjects such as legal technology. Some LPC/PEAT 1 providers include optional legal innovation/technology modules. Others do not.

#### Law Firms

...some provide training on legal innovation/technology topics. The training is for those who already work at those firms and many smaller firms do not have anything. Some of the larger firms offer trainee seats or secondments to innovation or similar teams.

#### Existing Industry Initiatives

...many are great but do not focus on addressing the skills gap across the entire legal ecosystem, are duplicating efforts or are working in silos, without necessarily reaching those without an initial interest in innovation. The Legal Technology & Innovation Certificate (LTI institute) has an interesting offering but appears to be a commercial venture and operates at a global level rather than being UK focused.

#### Regulators

...in the legal industry are starting to focus on these key competencies but unfortunately do not have the resources to devote the time needed.



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## Legal Co-Lab The solution

Legal Co-Lab is an independent web-based community that, through a series of accredited courses, offers access to the key skills that the legal industry mutually agrees are required to thrive across a wide variety of roles within the legal ecosystem.

Legal Co-Lab has 3 intertwined elements underpinning everything we do: Community, Courses and Collaboration. We passionately believe that these are our most important USP.

### **Community**

At the core of Legal Co-Lab is a working group of lawyers, innovators, technologists, educators and regulators from across the legal ecosystem collaborating to assess and mutually agree the key future skills and educational standards required for legal professionals. This collaboration will ensure that the Legal Co-Lab content and courses focus on delivering these skills as part of a toolkit.

### **Courses**

A series of micro-courses designed to equip users with the key future skills identified by our working group will be delivered through an independent web-based platform. We expect these courses will include topics such as resilience, data analytics and visualisation, project management and innovation.

### **Collaboration**

Users of the platform will form our Legal Co-Lab Community. Our Community will be accessible to all and joining the Community is free. Members of our Community will also be encouraged to use the platform to collaborate to solve challenges facing the legal industry posed by other members of our Community.



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## Legal Co-Lab The solution

### Scale

Legal Co-Lab is truly scalable. Our goal is for Legal Co-Lab to facilitate long-term collaboration amongst a diverse range of legal professionals in sharing knowledge and producing courses to enable the workforce to become better equipped for the legal profession of the future.

Once we have an engaged Community, Legal Co-Lab can easily incorporate additional elements including skills profiles (allowing recruiters to identify suitable candidates); challenges and datasets.

### Stakeholders

To make Legal Co-Lab a success, we will need to engage a large number of stakeholders. These include: the working group, regulators, educators, course providers and our target demographic. To obtain the necessary buy-in, we would stress to senior stakeholders that this provides the opportunity to mould future generations of legal professionals and the impact this would have in recruiting those with the key skills.

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### Users

Legal Co-Lab is targeted at a broad range of users including (but not limited to): students, legal professionals, technologists and project managers. While each user will have different needs for the platform, the skills framework will be diverse to account for the requirements of each user. We also want to appeal to non-law students and professionals through challenges that encourage collaboration with those from outside of the legal sphere. Through engaging with Legal Co-Lab, we believe that we can showcase the variety of roles available within the legal profession

### Fifth Level

The independence of Legal Co-Lab is key to generating the required buy-in. We propose that the City of London Corporation mediate and host the initial set-up of Legal Co-Lab to ensure that the platform remains neutral and that a well-rounded team of stakeholders is chosen to represent all parts of the sector.



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## Legal Co-Lab

### The business case

Our solution is a working group of lawyers, technologists, educators, regulators and vendors who will collaborate create, run and manage the Legal Co-Lab.

#### Costs

The initial set-up cost of Legal Co-Lab is time. We will bring together stakeholders from across the legal ecosystem to allow them to build consensus and a framework covering the skills needed for future legal professionals.

The initial working group will be voluntary, but stakeholders will be expected to identify individuals who can commit time to the project. We also require a lead coordinator, possibly initially provided by the City of London Corporation. A full-time role, it could be two individuals with a split focus on education and commercial approaches.

We want to include accredited 3rd party courses within Legal Co-Lab, but there is an expectation that stakeholders will also collaborate to develop courses, sharing their expertise and experience.

There will be a cost to the hosting, maintenance and delivery of the Legal Co-Lab platform. We believe the platform must be hosted in a neutral environment; a possibility could be for the City of London Corporation to host independently. Legal Co-Lab should be accessible through other avenues in the future, like the Law Society websites, firm intranets or university portals.



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## Legal Co-Lab The business case

Our solution is a working group of lawyers, technologists, educators, regulators and vendors who will collaborate create, run and manage the Legal Co-Lab.

### Funding, Financials and Investors

Key stakeholders will commit time, knowledge and experience to drive forward Legal Co-Lab and, importantly, to secure similar commitment (and possibly financial support) from others in the industry.

We envisage that the costs of hosting and managing Legal Co-Lab could be offset with 'freemium' style pricing on training courses, sponsored content and sponsorship by key stakeholders. We could also look to discuss subscription based training opportunities with universities and law firms, providing enterprise access to Legal Co-Lab to drive further revenue.

We want to ensure that there are no barriers to entry for those who want to use Legal Co-Lab and believe that access to the Community should be free, with only high value content being monetised.

### Overcoming Barriers

Securing engagement is the key hurdle. The concept of law firms collaborating and sharing innovative schemes with competitors is disruptive. We need to persuade potential stakeholders to be altruistic, collaborative and share their experience and resources to strengthen the legal profession and its future as a whole.





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## Legal Co-Lab Implementation

Implementation is broken into 3 phases, to enable an early launch with the minimum viable product and ongoing development. There is more detail on the phases in the accompanying timeline.

### Phase 1

- Engage key stakeholders (City of London Corporation and the three UK Law Societies, given their clout and ability to influence others, law firm representatives, inhouse teams, legal educators and legal technology vendors, gathering a diverse range of contributors and beneficiaries).
- Agree key future skills and educational standards required for legal professionals of the future and framework for accreditation scheme.
- Launch a pilot training course targeted at a select group of users (at least 100, perhaps a student or trainee intake) – an existing course or new course developed by stakeholders.

A working group of key stakeholders will provide strategic direction and project management, supported by one or more lead coordinators. The initial working group will be voluntary. It may be refreshed and specific sub-groups established to support specific initiatives.



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## Legal Co-Lab Implementation

Implementation is broken into 3 phases, to enable an early launch with the minimum viable product and ongoing development. There is more detail on the phases in the accompanying timeline.

### Phase 2

- Launch independent web-based platform to host training and Community: a free online Community, accessible to all.
- Expand training offering, taking account of pilot learnings.
- Roll out accreditation scheme, to encourage uptake and operate as an industry yardstick.
- Review agreed competencies, in light of experience to date and industry changes.

Training Courses will initially focus on skills in respect of which stakeholders are most comfortable sharing knowledge and collaborating (e.g., basic skills like Excel, PowerPoint, business case building, change management, etc.). In time, they will increase to a series of certified micro-courses designed to equip users with the key competencies required in their role (each course targeted at a different user: students, lawyers, technologists, innovators, project managers, etc.). These will include content developed for Legal Co-Lab and existing training accredited by Legal Co-Lab.



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# Legal Co-Lab Implementation

Implementation is broken into 3 phases, to enable an early launch with the minimum viable product and ongoing development. There is more detail on the phases in the accompanying timeline.

## Phase 3

- Offer additional content (including existing initiatives of stakeholders or other parties), such as challenges, competitions, networks, mentor programmes, job and internship listings: all furthering Legal Co-Lab's goal of upskilling the industry through collaboration.

Throughout, uptake will be increased through engaging stakeholders and demonstrating results. Legal Co-Lab is not exclusive to any part of the legal ecosystem. It will be available to all.

Phase 3 is not an end state. The ongoing digital transformation of the sector dictates that Legal Co-Lab must continue to develop and improve. It may even be transportable to other challenges.

These principles underpin implementation:

**Collaboration:** a core element of Legal Co-Lab, collaboration is fundamental to agree the key competencies, develop content and encourage uptake. There are potential barriers, which stakeholders must commit to overcome. Legal Co-Lab offers the opportunity to share the burden of upskilling under an independent banner that encompasses all stakeholders, encouraging collaboration not competition.

**Diversity:** the legal ecosystem is diverse, and to upskill the workforce, lawyers must work alongside other, diverse professionals (project managers, innovators, technologists, etc.).

**Transparency and Empowerment:** all stakeholders should be included and have a voice.



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## Legal Co-Lab Measurability

Metric	Success Criteria	Measured
User base	Engaged and diverse users.	Pilot group of 100+ users, with year-on-year growth. Users from a range of backgrounds, not just law.
Talent pool	Role profiles for hiring managers with the ability to host applications, vacancies and benchmark applicants.	Number of vacancies hosted on platform. Clear focus on Legal Co-Lab courses in applications.
Community	1000+ active users by end of Phase 2.	Metrics around daily accesses, courses per user and Community engagement.
Learning	Comprehensive coverage of a wide range of skills and development needs.	Surveys after course completion. Collection of user role profiles to identify learning gaps filled.
Courses	High completion rate of courses plus a positive survey response.	Courses completed per user, % of courses completed on average.



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# Legaleased



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## Legaleased Setting the scene

Many of us, as private individuals or businesses, will often overlook the finer terms and conditions included with correspondence or documentation we receive. This now even includes looking at the terms and conditions that might be linked to an app or plug in that we download. How many of us are worried that a third party provider may someday come and take possession of our property because we have never actually read the terms and conditions and could have inadvertently 'agreed' to permitting the company to do so. Even if someone did read the finer detail many would find it a challenge to understand what the terms mean and whether they provide any rights or impose responsibilities on the reader.

People & businesses, especially those that are vulnerable, needing to make decisions based on law or faced with legal issues continue to struggle with legal jargon they are presented with and may make ill informed decisions. A survey conducted by the International Association of Contract and Commercial Management (IACCM) shows that only 1 of 10 agreed that contracts are "easy to understand".

Those that are responsible for drafting legal text are likely to do so without the end reader in mind and in a way that those without any legal knowledge or experience cannot understand.

The gap between those with access to legal knowledge and those without will continue to widen unless something is implemented to bridge this gap. The legal sector will continue to be...

“

...seen as shrouded in a degree of  
mystery and aloofness...

”



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## Legaleased Setting the scene

People and business risk not being able to meet their legal needs conveniently, affordably or effectively. They lack the confidence to engage/communicate with third parties, their legal teams or instruct their own lawyer and to make subsequent decisions in an informed way.

Empowering people & businesses with information in a way that they can understand should give them the confidence needed to properly assess any risks and issues. This in turn should move lawyers into adopting ways of working that are fair and ethical. We want users to be able to secure "just" outcomes by using our solution that can be accessed 'on the go'.

By bridging the language gap through our 'plain language' initiative, we want people and businesses to be able to make informed decisions and if needed, approach a lawyer for help. Through this lawyers, especially freelance solicitors, will have the opportunity to be able to connect (as individuals or as a team) with our service and make an offer to provide legal advice.

By bridging the language gap through our 'plain language' initiative, we want people and businesses to be able to make informed decisions and if needed, approach a lawyer for help. Through this lawyers, especially freelance solicitors, will have the opportunity to be able to connect (as individuals or as a team) with our service and make an offer to provide legal advice.





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## Legaleased The solution

Legaleased translates legal terms and documents into plain English. A user can type, upload a document or photo, or speak their query into a Google translate type interface – receiving a quick response, without the need to go down the rabbit hole of the internet only to surface hours later with limited and incomplete information or even worse, incorrect.

Legaleased's key features are that:

It is web based and mobile enabled (with the potential for development into an app for frequent users)

For short terms or legal words the translate tool enables the user to get an immediate plain English translation. Users can type, speak or upload a photo of the legal words they'd like translated

It has the potential to connect the user with the right legal expert

The "Upload document" feature will read a user's uploaded document, providing a plain English translation; and using advanced insights and NLP, flags risk and complexity using simple colour coding (red, amber, green) to highlight how needed a legal expert is – so the user is in no doubt when for example, a lawyer needs to be instructed

And most importantly, it's inclusive and accessible – demystifying legal jargon, and a leveller to access to legal services. Not only is it easy and intuitive to use and access the tool, but it also puts legal services providers and their customers on a more equal footing, and resulting more meaningful client/lawyer interactions



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## Legaleased The solution

While it was clear Legaleased could have a very wide target audience, to develop a clear value proposition we needed to limit ourselves to developing a core persona. Having identified that our majority of users as being both individuals and commercial enterprises we looked for our core persona to embody both these groups.

ONS data shows that the 5.9m small and medium sized businesses make up 99.9% of the business population AND of these 5.9m, a considerable 76% have no additional employees. So this seemed a segment of society that could represent our target audience.

We created the persona of Sam to try and capture the needs of this vast group. Sam is an individual at the beginning of setting up a start-up. We made Sam Gen Z and considering the research into this age group, thought Sam's start up could be inspired by their personal passion, and their consideration of accessibility, sustainability, maintaining independence and being able to work flexibly.

Drawing on our direct user research from our focus group of individuals who have set up their own businesses, we gave Sam limited commercial experience, limited funds, and no or few professional contacts. And to match the majority of society, no legal knowledge or training.

Our focus group explained that they had faced substantial challenges to set up their businesses, struggled to find out what they needed to know and do, who could help them and what that assistance could cost and its benefits. Ultimately they couldn't access easily understood, affordable, trustworthy information to support their start up with legalese and jargon the most major challenge.



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## Legaleased The solution

Whilst our ideation process was based on our persona, Sam, Legaleased's potential audience is much wider. This is a tool which will allow business professionals to self-serve their legal or quasi-legal queries without needing to engage an in-house lawyer: thereby helping that in-house team fulfil and oft-cited aim to "deliver more with less".

Perhaps the most exciting, though, is the potential of Legaleased to help the most vulnerable in our society. Since 2010 we have seen a reported 40% cut in legal aid\* and last year it was reported that "Half of all law centres and not-for-profit legal advice services in England and Wales have closed over the past six years, according to government figures"

There is clearly a need to help people understand the legal jargon in letters and documents that they might receive in daily life.

**Legaleased will level the playing field**



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## Legaleased The business case

Legaleased will be available, free, to those who need it. Individuals who, on receiving a lengthy letter full of legal jargon, might not know where to turn or might not be able to access a legal advice centre immediately. Individuals who have accessibility needs who cannot easily leave their home or who would benefit from an audio transcription. Legal Advice Centres which, when faced with queues round the block and demand far exceeding availability, have to turn people away.

There are a number of options we will explore to determine the economics, however, with CSR objectives being, rightly so, at the top of the agenda for many corporations today, we are confident of a viable solution. Options to be explored include, subject to further analysis around FCA authorisation, a tokenisation scheme to allow corporations to "buy" credits for individuals in need.

Legaleased would enable users to understand legal texts without help of a lawyer and would assist in finding a legal expert. It would be useful to businesses and individuals who have the need to understand legal documents but do not want or cannot afford to hire a lawyer.

In addition to time and costs savings, Legaleased would generate revenue through sale of subscriptions and data analytics.

We estimate that initially 80% of the project's costs would be labour which would include a full-stack developer, a part-time knowledge lawyer and a project/ product manager.

We expect that our project has the potential to attract private angel and institutional investors. Given the social benefit and impact that our solution may have, we think we would also be eligible for government innovation grants. As our intention to make our product easy to understand and use for any individual, we may also consider crowdfunding option to raise necessary capital.



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## Legaleased The business case

### Technology Team

- Full-stack developer
- Machine Learning engineer (for the later versions of the product)
- UX/UI designer (as needed)

### Business team

- Product/Project Manager
- Knowledge lawyer (part-time)
- Marketing/Partnerships manager (at a later stage)

By using Legaleased users would make better decisions through increased awareness of potential legal issues. Customers could save money on legal fees by using Legaleased and engaging lawyers only when it is necessary. Harvard Business Review estimates that businesses can save as much as 60% of time in negotiating agreements by using plain English and removing the need for the lawyer's input. This means that business can reallocate their resources and avoid the need to hire employees. For example, it can be measured by monitoring the number of ad-hoc requests from business teams to in-house lawyers before and after introducing Legaleased.

There are other business specific activities such as claims processing, responding to queries, document management, which productivity can also be easily measured. Our solution we will use a multi-tier subscription model based on the size of the business (i.e. small, medium and large)



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## Legaleased Implementation

We estimate that it would take up to six months to build the first version of the product, which would include collaboration of software development and legal knowledge teams.

Our implementation will be split into two core areas, the first focusing on the legal knowledge required for the platform and connecting with relevant stakeholders. The second would be the technology workstream to develop the interface and back end processing of the legal jargon.

Our intention would be to start with a smaller, less resource intensive pilot which would focus on one area of law within one jurisdiction. This will allow us to mitigate some of the technological, market and regulatory risks by starting with a simple jargon replacement tool to test the market.

We would setup a working group to provide feedback as we develop the initial platform and work with subject matter experts to provide the know-how and final translations. We will use our working group to test and provide feedback on our first version. That feedback will be use to iterate and improve the product for launch. We also want to seek accreditation from the Plain English Campaign to further support our case and lend credibility to the solution.

Once Legaleased is live and we have begun onboarding our first customers we will then look to extend the reach of the product. First within the knowledge space we will work with more SMEs across other areas of law and jurisdictions. We are also very mindful of accessibility so features like multiple language support and text to speech for those who prefer that method of interaction.

On the technology side we will implement machine learning and natural language processing technologies to enable whole paragraphs or documents to be read, translated and then summarised for users.

We also want to explore the possibilities of integrating with other legal and none legal platforms to make connecting users to the right legal advice a simple click. So no matter whether you are using Legaleased through your firm and want to continue your query with your inhouse team, or you are an individual who has never engaged with a legal service provider before, then you will be directed to the right place to help you with the next step.



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# Legaleased Implementation

## Barriers

As a new concept to challenge the conventional methods of delivery of legal services, Legaleased will face certain barriers to entry to the legal market.

These include ensuring the legal data provided by our product is up-to-date, enhancing the user experience and making sure that the process is easy to use, smooth and seamless, pitching to users at the right level of a fee structure, dealing with the regulatory risks relating to the product and pricing models, the protection of user data and the practical technological challenges.

Last, but not least, overcoming the culture of the legal profession.

## Potential solutions

To tackle these challenges, we would ensure the buy-in and support of stakeholders (such as law firms and legal knowhow providers), conduct "sandbox" testing on user experience with a range of potential target users and perform targeted surveys on a variety of fee structures. We will seek appropriate regulatory advice on our product and engage with regulators to ensure, for instance, that the service does not amount to legal advice or to address the potential e-money implications for the use of tokenisation in the fee structure.

Moreover, we will put in place security measures to control and protect the integrity of user data, garner the support of technology teams and gain acceptance of the legal profession by helping them to see the value proposition of our product to their businesses with a view to encouraging collaboration within the stakeholder ecosystem. A good example is that SME start-ups usually have limited financial resources to purchase legal services and law firms can therefore be reluctant to act for them. Our product will help law firms/ legal advisers to capture this segment of clients by presenting a cost-effective solution.





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# Legaleased Implementation

## What will success look like?

Success for us is Legaleased becoming an application that is used by default as part of the legal process, embedding a significant change to how legal services are being delivered. There are a variety of different channels that will drive that success.

We want the development of the application to be driven by the user. To achieve this we need uptake for the system so that we have data trends to evaluate. We want to understand the type of legal queries the tool is being used for and the customer base so that we can prioritise application development accordingly.

Legal sector collaboration is key to our success. We need buy in from law firms and for them to be our brand ambassadors so that other sectors and industries also get involved. This could ultimately extend to including charities, Citizen Advice, local education and the sectors supporting the most vulnerable in society.

Real and sustained change to the delivery of legal services can only come if the next generation to come through the ranks is on board. Incorporating the use of our technology as part of the training for new and junior lawyers is a way to embed this new way of working and supports our narrative of the importance of collaboration and levelling the playing field to deliver access to justice.

Some of our success goals are short term, some more long term and aspirational but all of them require continued investment and development of the tool. We are only just getting started and the opportunities for growth are vast. For example the tool could ultimately support a global audience, support requests in multiple languages and be completely customer agnostic.

CSR objectives will always be at the heart of Legaleased. We want our tool to be generating revenue (via sponsorship, tokens, subscriptions etc.) to remain accessible for all and not to be known in the market as a revenue generating product.



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# The Red Pill



### What is our challenge?

GCs across many sectors are struggling to innovate, perhaps none more so than the hospitality sector in London given current market conditions created by the pandemic. Deciding where to start with innovation, which technology to introduce, and how and when to implement it, is challenging. The problem is exacerbated by the fact that business expectations of GC's are changing rapidly. GC's are expected to be more proactive rather than reactive, not only providing legal advice but also being more involved in the strategic direction of the business.

### What are the Issues around it?

GCs have time, budget and resource constraints. Many GCs feel overwhelmed by information overload, too many potential solutions and technical jargon which change rapidly, alongside a very sales focused approach from providers. This is coupled with the fact that there is little support or knowledge in-house to adopt and implement change. As a result, there can be a fear of innovating in case of failure when budgets are more limited than ever.

### What impact is it having on the legal sector or society?

The risk averse and conservative nature of many lawyers is preventing innovation. There has been a very slow pace to change other than in response to the pandemic. The lack of a true cultural shift in terms of structure and delivery models is preventing the legal profession from keeping up with the demands and expectations of businesses and consumers. Business operating models and markets are undergoing seismic change. GC's need to keep up.



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## The Red Pill Setting the scene

### **What are the longer term risks if we don't address this challenge?**

The risk of not innovating is the lost opportunity for in-house teams to upskill and diversify in a changing legal market, as well as the lost opportunity to reduce legal costs and/or increase business revenues by working more efficiently. Many GCs have the goal of becoming profit centres as opposed to cost centres but the risk is that they won't achieve this goal if they continue to fail to innovate, adopt tech and shift cultural ideas. Investment in innovation is required in order to secure businesses for the future. If the profession cannot innovate others will and changing regulation will allow it.

### **What are the opportunities if we solve the challenge?**

This is a widespread problem that affects many sectors and therefore there is an opportunity to scale. An innovative work environment and pioneering approach would help attract and retain talent. We could create a very effective and rewarding way to learn, with an altruistic element – a way to gain valuable knowledge and to share expertise and experience. This is an opportunity to empower GC's and to provide them with the tools to solve their specific problems even as these change over time.

### **What else has been done to date – why is this not enough/not successful?**

The existing awards, conferences, networking events and technology comparison sites lack the collaborative and shared expertise elements. There are also online digital content and online communities attempting to foster collaboration. However, these don't solve the whole problem which is not only technology. These solutions do not allow for putting skills in to practice or give GCs the opportunity to develop key problem-solving skills which is the best way to learn. There is no leveraging of the experience and ideas of true subject matter experts who can empower GCs to be bold and start the cultural shift.



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## The Red Pill The solution

We will be seeking the participation of GCs in a television "reality business challenge" called "Red Pill" that we will launch as a low budget pilot on Twitch TV or a similar streaming platform during 2021. Using this approach, we will offer recently appointed practical and timely support to GCs responsible for London-based in-house teams of five or under in the hospitality sector.

We want to offer them the opportunity to examine how to improve their working methods and understand how innovation and technological solutions could benefit them. This will be achieved by building their decision making and technical knowledge toolkit and providing them with the skills to assess what to do next. We will work with them to build their understanding of a particular challenge and show them a path to solving it in a way that is collaborative, intellectually stimulating and will bring immediate benefits to their team, their organisation and to other GCs facing a similar challenge.

### How will it work?

Participants will operate either as individuals or groups with a support team of experts and coaches to help them develop the necessary skills to understand their business need and determine what – if any - new legal technology infrastructure may be required for their organisation.

In addition to the technical expertise they acquire during the course of the programme, the sole winner or winning team will win a financial prize (sponsored by KPMG). Part of it will be donated to a charity of the winner or winning team's choice. The remainder can be used on training, expertise or equipment to improve



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## The Red Pill The solution

### Who are the target audience?

Any GCs appointed to the role in the last six months, currently employed in the defined sector. They will be facing the challenges of adapting to their new role, managing an increased workload with diminished resources and responding to rapid change within their own organisation and the wider legal services sector. They will need to demonstrate a willingness to experiment with new approaches and a willingness to invest time in learning what options could be available to them.

### What are their needs that relate to your solution?

uncertain of the best approach. Lacking the knowledge to make an informed decision, they feel there are too many potentially expensive and career threatening choices. They are not even certain if new technology is indeed the right answer. In tight business conditions, the GC must overcome internal senior management reluctance to commit time and budget to anything that cannot show immediate benefit and may disrupt the organisation in its implementation. The GCs must learn how to make a convincing case for change.

### Who are other key stakeholders?

- Sceptical senior management of their organisation reluctant to change their internal processes.
- Cautiously optimistic in-house team members hoping for a way to address their work overload and help them have a better work / life balance.
- Coaches, legal technology experts, decision-making specialists and creative thinkers from non-legal sectors as part of the support team.
- Audience participation with questions and suggestions.



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# The Red Pill

## The business case

Our scheme will provide an engaging and easily accessible way for participants and the audience of the shows to learn and develop the skills they need to analyse problems that they face on a daily basis and assess the most appropriate solution.

### Benefits

We will measure our success by the number of GCs wanting to take part (aiming for between 5 and 10 in the first series), the number of views of the recorded shows (at least 10,000) and the level of demand for a second series.

For the participants, the solution will save money by giving them the opportunity to develop an effective and efficient problem-solving approach which they can use in their day to day roles. There will also be cases where the solutions developed on one of the shows can be implemented as a solution to an issue that they are facing. There is also the possibility that the participants are able to develop money-making ideas for their businesses by employing the methods developed during the series.

We plan to take a base case snapshot of each participant at the start of the series and compare that with a snapshot at the end of the series.

### Costs

The first series will be produced on a low-/ no-budget basis meaning that we can assess the viability of the concept with minimal financial risk. To the extent possible for this first series we will use the skill sets that we have within the group with support from friends and family

A successful, engaging first series will attract funding for future series which will enable us to outsource certain elements of the planning, production and delivery. We envisage that sponsors could include tech providers, law firms and even businesses whose GCs have participated and benefitted from previous programmes. We will also explore further options for monetisation such as offering bespoke sessions for organisations and product placement.





## The Red Pill The business case

We have identified the following as the six **6 key risks** related to our solution:

Our concept depends on having willing participants – GCs, coaches, judges – so if we are unable to sign up enough people, we fall at the first hurdle

We are aiming high and our plan could sink or swim – if the format of the show doesn't resonate with audiences, we will be unable to create the community that we are aiming for

Successful reality TV shows work because they show the disasters as well as the triumphs – we need to strike the right balance between creating an engaging show and ensuring that we don't expose our participants

What if we create an engaging show but that's as far as it goes – there is no benefit for the GCs who take part and no take-away points for the audience

One of the strengths of our plan is that we launch with a low- / no-budget first series meaning that we have minimal financial risk. But doing it on a shoestring may mean that we have to cut corners which have a negative impact on the overall project

And finally, what if we are on to a good idea but fail to maximise the potential and lose ground to other similar concepts

### **Other options** considered included:

- App to help GCs match issues and solutions. GCs are able to upload videos of 'typical day in work' and tech /law firms suggest solutions with sponsorship.
- GC Bootcamp, recording people's engagement with tech in a 'safe environment' and turning fun into a lesson.
- Apprentice style "fix my problem" competition bringing interested parties from across the ecosystem to come up solutions which, as far as possible should be made available on an open community basis.
- Videos of "unwrapping" tools - users giving honest account of deploying tool and how it has helped them.

# The Red Pill Implementation

## IMPLEMENTATION PROJECT PLAN

	DATE: JAN - FEB 21	DATE: FEB - APR 21	DATE: APR - MAY 21	DATE: MAY-JUN 21
	PHASE 1 Discovery & Project Set-Up	PHASE 2 Planning & Content Creation	PHASE 3 Developing, Testing & Marketing	PHASE 4 Pilot go-live
Activity	<div>GC interviews / discovery</div> <div>Identify coaches / mentors</div> <div>Agree 'shoestring' budget</div> <div>Donation of 'innovation hours' from law firms to free up staff!</div> <div>Project setup and governance</div> <div>Map all stakeholders and their involvement</div> <div>Kick-off</div> <div>Identify and pitch to sponsors</div>	<div>Develop creative concepts for what it will 'look and feel like'</div> <div>Project planning</div> <div>Create the content for each session and test the activities</div> <div>Establish a group of partners to develop the product</div> <div>Social Media posting/campaign</div>	<div>Create the trailer</div> <div>Organise the launch event</div> <div>Internal test / run through</div> <div>Social Media posting/campaign ongoing</div>	<div>Filming of the pilot episode</div> <div>Launch the videos on YouTube</div>
Responsible	<div>Team member(s) from stone soup</div> <div>Project Manager</div> <div>Coaches</div> <div>Sponsors - Col Corp? Law Soc? CLOC?</div>	<div>Project Manager</div> <div>Creative team - someone in stone soup?</div> <div>Group of partners (in-house and law firms)</div> <div>Coaches</div>	<div>Project Manager</div> <div>Whole project team and participants</div>	<div>Editors</div> <div>Creative team</div> <div>Project Management</div> <div>GCs</div> <div>Judges - Col Corp? someone from Faculty CLOC?</div>
Deliverables	<div>GC volunteers</div> <div>Challenges to explore in the 1st series (5 episodes)</div> <div>Budget (5k-10k?)</div> <div>agreement of time commitment</div>	<div>Website for the show (very simple) with link to the channel</div> <div>Social media channels created + marketing for the pilot starts</div> <div>Project plan</div> <div>Episode list (6 x 18 minute episodes)</div> <div>Creative concepts</div> <div>Marketing Trailer</div>	<div>Output of the internal pilot</div> <div>Launch event - could host at a GC's office?</div> <div>advertising in major business/law publications</div>	<div>18 min episodes (play off 6 min units)</div> <div>Alumni network</div>



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# The Red Pill Implementation

## User adoption

To make the programme as accessible as possible, we are looking at multiple social channels (Instagram, LinkedIn, Facebook) to build a following and to connect with other like-minded influential people from within in-house legal teams.

The main platform for our show will be on Twitch as it's a new and exciting streaming platform that is changing how individuals engage with online content. Our potential global audience will be able to see how London GCs and legal teams are changing their approach to meet the demands of their businesses.

## How we will obtain buy in from stakeholders

We will focus on the challenges of GCs needing to adapt to the needs of the market and to be ready for a future of accelerating change. Our programme is fully experiential and will equip GCs with skills to succeed as a 21st century in-house legal professional, this will be an attractive learning & development proposition for businesses. We believe that this is a completely unique approach to the challenges of collaborating across teams and embracing new tech. We will sell the purpose of our programme to businesses and will generate a buzz around the product that will encourage sponsorship and engagement from stakeholders.



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# The Red Pill Implementation

## Barriers & Mitigation

### Cost

Shoestring development of the product for the first pilot/series. A solid project management approach will be used to keep costs down. (Feature films have previously been shot on iPhones)

### Time

Using sprints and an agile project management approach we will quickly test and develop ideas internally to maximise our use of time to ensure the highest quality content and final product

### Production

We have opted for 18-minute episodes (3 'units' of time). We will focus our efforts on creating quality content to reduce edits and reshooting.

### Marketing

We will make use of social media platforms and existing relationships (from within our team and the programme sponsors) to create awareness of the show and to drive interest in participating / watching the show.



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# The Red Pill Implementation

## Measuring success

### **Audience Numbers:**

Our channel will have lots of views and will be talked about in legal circles. (more than 10,000 views)

### **Engaged GCs:**

GCs that participate will find the programme transformative. Other CGs will find the show engaging and informative. (5-10)

### **Demand for a second series:**

Applicants for another series (in a different industry)

### **Benefits from winners and losers:**

We will highlight the learnings of the GGs that mess up and the ones who are successful - we want to highlight that failing and being comfortable with failure helps to build skills.



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**Collabify**



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## Collabify Setting the scene

Collaboration is a buzzword in the legal sector. It is often used and many initiatives are sold as being “collaborative”. However, the grass root reality is that the effective collaboration on a day-to-day basis is still very much aspirational.

We have heard from senior in-house Counsel that if they had a magic wand the one thing they would fix is collaboration in the legal ecosystem. A means by which everyone is thinking about the team outcomes rather than just their link in the chain.

The traditional structures of working and remuneration for in-house legal teams and law firms do not lend themselves readily to a more collaborative open source environment in the legal sector.

Therefore, it is necessary to innovate to break the barriers and reshape the working environment to incentivise collaboration and balance it with the economic reality that operators in the legal sector are ultimately competitors and need to be remunerated for their services.

We defined our problem statement as follows:



How might we incentivise improvements in service delivery within the legal services ecosystem through improved collaboration







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## Collabify The solution

Our solution is to create a toolkit for collaboration supported by a common set of objectives.

When developed and implemented, our solution will mean:

Increased efficiency in the requisition and delivery of legal services. This will help in achieving not just cost savings but also quality of work delivered

Clients and lawyers are able to access the available resources more efficiently and more easily prioritise time and costs on business-critical issues. This, in turn, will result in value generation

A more harmonious working environment. Now, more than ever, there is a focus on improving the working life and atmosphere. To attract and retain the best talent requires a commitment to the well-being of the workforce

More competition between service providers through innovation and effectiveness, to drive value for the client

Reputational boost for the legal sector and a good case study for the significant value that the legal sector adds to businesses and the economy



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## Collabify The solution

We recognise that this is not the first time that someone has sought to streamline legal service delivery. There are other projects like those relating to taxonomy in legal services, legal development aggregation and chatbots that aim to provide standardised responses and template documents. However, what has been missing from those projects and initiatives is an overarching theme of collaboration and desire to create a toolkit that can reshape the existing ecosystem.

The current products and solutions are designed to fit around the existing structures and, as explained above, that in itself is a roadblock to better collaboration. There is so much information out there, but our clients don't know where to start. How do they take advantage of the knowledge out there when it is in such an unstructured format? Our solution resolves this problem – we harness the power of the existing products and bring them together in an agile toolkit to create a new whole.

Our solution can also help bolster the power and image of UK legal services across the globe. At a time when legal services are becoming a focal point for growth in various cities world over, a toolkit for collaboration supported by a common set of objectives for the legal sector is capable of transcending jurisdictions and being a beacon of cutting-edge service delivery. If this is led out of the City of London it will spotlight talent in the UK and create a new growth area for our professionals worldwide.

Our solution is a toolkit comprising curated content designed to incentivise improvements and further collaboration in legal services delivery.

It will become a trusted source to help to answer the question:





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## Collabify The solution

The toolkit is structured in three sequential steps:

### 1 Scoping

- How do I frame my problem question?
- How do I determine my "customer"?
- How do I identify critical success factors?
- How do I prepare a business case?

Structured guides and pre-populated use case scenarios will be made available to provide the user with the confidence to engage stakeholders, carry out user research and empathise with key stakeholders, identify and articulate their problem clearly, define "success", and secure buy-in from colleagues.



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## Collabify The solution

The toolkit is structured in three sequential steps:

### 2 Identifying

- How do I first map and improve my internal processes?
- Which areas of my business should I target first?
- Which products and services are available to support these processes?
- What do those buzzwords really mean?

Workflows will be made available to identify common pain points in internal processes and how to perform an internal “spring clean” before looking to technology solutions. Once ready to seek out potential providers, the toolkit will provide a glossary of key terms (over time assisting in the creation of a common language), and a directory of products/providers identified by clear “tags”, seeking to avoid jargon and instead further understanding. Case studies will be provided as worked examples of successful implementations.



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## Collabify The solution

The toolkit is structured in three sequential steps:

### 3 Procuring

- I have framed my problem question, I have improved my internal processes, I have identified potential products and services.
- How do I try them, how do I source them?
- Advice on structuring / running proofs of concept to test an idea, as well as detailed guidance on procurement (whether direct award or competitive tender) to source and implement.

Once the user has framed their problem, improved internal processes, and identified potential products and services, they will have access to tools assist successful proofs of concept and implement new processes and solutions. This would include identifying a sponsor, building and communication a business case, risk assessments, success criteria and template documentation.



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**Collabify**  
**The solution**

## **Our target audience**

Our target audience is deliberately broad. With the ultimate aim being to increase collaboration across the legal services ecosystem through the use of a common language, the toolkit will be agnostic to in-house, private practice and for profit and non-profit businesses.

## **Our unique selling proposition**

Our toolkit can become a centre for collaboration, a single source for solving the issue of “Where do I begin?” which brings together separate pieces of knowledge and continues to grow and develop as more users plug into it and contribute to its content and wisdom.

We do not seek to reinvent what has already been done, but rather see it as a means of further developing great work; structuring currently unstructured information into a single trusted source.

There are so many excellent examples of content that has already been prepared. Examples include those from Juro, CraftyCounsel, Lexology, the Chancery Lane Project, Google, firm’s individual blogs, Thomson Reuters, or consultancy advice documents including the pack provided to us on this sprint. The barrier is that this information is difficult to find, unstructured, piece-meal, and in different languages. It often requires subscribing to multiple resources or performing a scraping exercise, which adds on costs and is not scalable or reusable. Ultimately, lawyers and firms remain siloed and the information imbalance within the legal ecosystem persists. Our unique selling proposition is that we can bring all of this information together, in a neutral space, and in a common language that is easy to navigate and understand. We see these content providers as a great resource to gather and build our toolkit, and an opportunity for curated and sponsored content. The toolkit is envisaged as an aggregator of information, which provides strong incentives for participants to contribute, structure, re-use, and curate the content.

Within industry, there are clear synergies between work that is being delivered by the LawtechUK panel, Innovate UK, City of London Corporation, UKLTA and beyond. We see this as further potential for grant funding or co-sponsored collaboration as a project delivery partner.



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## Collabify The business case

We believe that “a rising tide lifts all boats” and that by introducing and incentivising a curated toolkit for effective collaboration we will see an overall improvement in the quality, effectiveness and efficiency of legal services across the sector.

If we can acquire the right support and sponsorship from an initial flagship sponsor, ideally of high profile and willing to work closely with us to develop (and benefit from) the product on an ongoing basis, and form key partnerships with other bodies and groups, we can keep the costs of building and maintaining the platform low and deliver enormous value to those who subscribe to the service.

At the same time, we will place a value on maintaining our independence, ensuring that all content goes through an editorial board for style and appearance.

We will run on a costs recovery model, with no desire to achieve commercial profit and to ensure our independent values are maintained. The toolkit is designed to incentivize changes through showcasing expertise and encouraging better client relations, but is not a commercial product in itself. By keeping our costs to a minimum, and reinvesting any profit generated, we will ensure that we do not rely heavily on external influences and that we can include an array of partners.

The subscription model would be as follows:

- Special status for founding members
- Trial to restricted content for 3 months
- Subscriptions on an annual basis to ensure revenues can be monitored
- Sponsored content at an increased fee (subject to editorial review)
- Free access for charity and students
- Any profit generated will be used to enhance the platform, or add further curated content of value





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## Collabify The business case

### Costing

The main costs associated with the platform will be in appointing a curator and project manager, and finding support for communications and subscription services, and in maintaining and managing the subscription services and platform. However, these will be relatively modest if we can tap into the partners, platforms, suppliers and content already available in our sector.

We hope to get first subscribers through the private communication channels (e.g. through the support of the City of London Corporation or promotional efforts of a flagship sponsor and founding members). Further down the road, we can start investing in marketing and promoting our platform using initial revenue streams.

While a full costs analysis is required to determine costs, we expect that after year one (supported by funding from our main sponsor), we would need approximately 200 subscribers paying £500 per year to cover any ongoing costs.

Revenue would be earned through the subscription model and from sponsored content (legal services businesses or suppliers).

### Funding

We would hope grant funding would offer support to get the platform off the ground based on synergies already happening in industry. We would look to LawtechUK, City of London Corporation, or another NPO such as UKLTA to take advantage of their platform and resources to keep costs low.

We would also approach legal services businesses to join as founding members with their cost based on the initial fees required to get the project up and running.

After this, we would offer a subscription model to the platform which would be attractive to charities, in-house teams, and other legal services businesses. We expect this may be particularly relevant to small or mid-sized teams that lack resourcing.



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## Collabify The business case

### Building the solution

We would look to the community we already know to help us with the resource, content and technology platform to deliver our solution.

With initial sponsorship to cover the first year's costs we would look to keep these as low as possible by working with established groups and tech partners to establish the resource, content and platform required in the early stages. In return, these bodies or suppliers will have access to the resources, the ability to reach a growing audience of firms and help support true collaboration. The more firms subscribe, the more relevant use cases and testimonials will be added to the platform. The more they add, the cheaper it will get for them and the more community members we will attract.

In terms of the technology, we would require a website developer to assist us in creating the platform



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## **Collabify** **The business case**

### **Benefits**

The solution - a toolkit for collaboration supported by a common language - provides commercial benefits to all participants of the legal ecosystem in a number of ways.

#### **For in-house teams:**

- Saves time by cutting through the information noise and providing a clear roadmap/frameworks/tools for analysing problems and finding solutions;
- Saves time and reduces costs by providing a quick access to the best practices and solutions tested by the whole industry - no need to reinvent the wheel, no money spent on costly and inefficient trial-and-error process;
- Access to the best legal tech tools and innovation solutions - not just tools and platforms, but to the clear standardized knowledge and expertise on how to apply them efficiently;
- Allows to speak in a common language with both law firms and tech providers - time savings and the synergies released through effective collaboration;

#### **For law firms:**

- Allows to respond to the clients (in-house lawyers) needs more effectively, thus retaining the clients and providing more work;
- Allows to reduce write-offs/useless work/efforts spent on the output that is not relevant by cutting through the noise and using tested workflows/models/roadmap;
- Allows to quickly understand where they stand against the competition and industry standards -> more effective marketing and reputational gains - > more work -> more revenue streams;



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# Collabify

## The business case

### Benefits

The solution - a toolkit for collaboration supported by a common language - provides commercial benefits to all participants of the legal ecosystem in a number of ways.

#### **For legal tech providers:**

- Access to more customers -> new revenue streams;
- Awareness raising exercise done for them - quicker conversion from prospective/passive customers into active adopters;
- Toolkit to understand the needs of the clients (in-house and law firms) and speak in their language - > more effective sales and servicing -> more revenue streams;

#### **For public authorities:**

- Reputational gains;
- Flourishing legal ecosystem - > more revenue streams from taxes; more jobs; more supporting services (e.g. financing, housing, etc.);
- Benefits for end-users - > better served businesses and citizens, including the most vulnerable;
- The single point of access and collaboration with the legal players - speaking common language, leveraging connections to boost innovation.



Our implementation plan and next steps are outlined below and in the diagram overleaf.

## Sponsorship & Investments

- City of London Corporation
- Lawtech UK
- Early Adopters (Large Corporations)

## Governance

- Structure of organisation : CIC, Hybrid, Non-Profit
- Management Structure
- Independent Advisory board
- Volunteer Board
- Operational Management Committee
- Norms

## Membership Target

- Private practice partners
- GC- Corp/inhouse
- Students - Law Student or students with interest in legal
- Trade groups – Law Society
- Educational Organisations – Universities
- Innovation think tanks – Innovate UK

## Content Development

- Content sourcing plan & best practice documents
- Resourcing plan
- Quality assurance & editorial process maps

## Technology

- Procurement
- Cost assessment
- UX focused Design
- Follow MVP model
- API or similar integration with partners

## Marketing

- LinkedIn Groups
- Slack Channels
- Conferences
- Podcasts
- Social Media
- Legal Blogs and other Media

## Sponsorship, Investment & Governance

- **Sponsorship & Investments**
  - City of London Corporation
  - Lawtech UK
  - Early Adopters (Large Corporations)
- **Governance**
  - Structure of organisation : CIC, Hybrid, Non-Profit
  - Management Structure
  - Independent Advisory board
  - Volunteer Board
  - Operational Management Committee
  - Norms

## Technology & Marketing

- **Technology**
  - Procurement
  - Cost assessment
  - UX focused Design
  - Follow MVP model
  - API or similar integration with partners
- **Marketing**
  - LinkedIn Groups
  - Slack Channels
  - Conferences
  - Podcasts

## Securing Stakeholder buy-ins

- Early engagement with target members e.g. – surveys
- Secure key endorsements
- Transparent Budgeting
- Not for profit messaging
- Generate/leverage on legal community feel
- Complete stakeholder mapping
- Create ecosystem map to analyse platform user context
- Create stakeholder motivational matrix

## What will success look like?

- 10,000 platform/website page views upon launch
- Content consumption rating 7 or above > (Consumption metrics)
- User retention above 70 % > (Retention metrics)
- Content sharing above 50% > (Sharing metrics)
- User engagement rating 7 or above > (Engagement metrics)
- High content quality rating 8 or above > (Quality metrics)
- Low running cost > (Cost metrics)
- Double membership subscription in the first year



## Resource, Membership & Content Development

- **Resource**
  - Recruit a PM for coordination
  - Organise volunteers for content sourcing/contribution
  - Technical resourcing – design/maintain/support platform
  - Editorial committee – quality assurance
- **Membership Target**
  - Private practice partners
  - GC- Corp/inhouse
  - Students - Law Student or students with interest in legal
  - Trade groups – Law Society
  - Educational Organisations – Universities
  - Innovation think tanks – Innovate UK
- **Content Development**
  - Content sourcing plan & best practice documents
  - Resourcing plan
  - Quality assurance & editorial process maps

## User Adoption

- Complete target members surveys
- Prioritise content sourcing based on survey results
- Pilot content and platform functionalities with sample users from target members
- Focus on quality of content vs quantity
- User/Member listening exercise
- Relationship centred design
- UX focus

## Potential Barriers & Mitigation

- Set up cost > Sponsorships
- Membership cost > Transparent Budgeting / Non profit messaging
- Why Collabify? > One stop shop for quality legal content/guide



## Collabify Implementation

### User adoption

We have considered how to encourage user adoption by thinking about what the client needs (more time, less confusion) and how they will access our service.

To increase adoption, we will:

- Complete targeted members surveys
- Prioritise content sourcing based on survey results
- Pilot content and platform functionalities with sample users from target members
- Focus on quality of content vs quantity
- User/Member listening exercise
- Relationship centred design
- UX focus

### How will we encourage stakeholder buy-in?

- Early engagement with target members e.g. – surveys
- Secure key endorsements
- Transparent Budgeting
- Not for profit messaging
- Generate/leverage on legal community feel
- Complete stakeholder mapping
- Create ecosystem map to analyse platform user context
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# Collabify Implementation

## Barriers & mitigation

The set up cost will be a primary barrier to our solution. We can mitigate this through finding a founding partner, grant funding and sponsored content.

Membership fees will be a barrier to subscriptions, particularly from organisations with tight budgets such as charity, small or mid-sized firms, and public service. We will mitigate this through keeping our costs as low as possible, operating only on a cost-recovery model. We will also offer free subscriptions for the charity sector and students, and have non profit messaging. Finally, we will have transparent budgeting and governance in place to illustrate how we use membership fees.

We will market COLLABIFY as a one stop shop for quality legal content and guides. While there are competitive services in the industry, we believe we will be the only platform that successfully aggregates all of the information in existence and creates new content, designed for clients based on their feedback.

In summary, we think...

- Our solution is pragmatic. It is realistic. It can be implemented easily.
- Our solution is innovative in that no one has tried to aggregate a roadmap to assist communication in this way and at such a large scale.
- Our solution addresses the challenge of fostering collaboration and incentivising people to do it.
- Our solution would transform the way clients and their lawyers interact.
- Our solution is an inspiring way to look at how the ecosystem can work better together.
- Our solution can save time, provide better services, and in turn, create more value for money.
- Our solution can scale to different industries or countries where there is an interest to better collaborate.
- While there are barriers to adoption and implementation, we can overcome these challenges through a solid governance, editorial, and cost-recovery model.



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# Legaliscious



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## Legaliscious Setting the scene

As a team, we explored a specific challenge within the legal sector regarding the capturing and communication of targeted, valued data for clients. There is a problem where clients are unable to understand any value add currently being provided by the law firms they work with and therefore are unable to accurately report back to their businesses to justify their external legal spend. This leads to frustration as the client feels that the data does exist, but they do not have access to it or any insights it may provide. Additionally, law firms and clients struggle to map their BAU processes and define how to measure performance, and in turn, architect what data to capture about what, when, where and why in their processes. Without this, data-driven decision making by law firms and clients is impossible and prevents development. Aside from the direct challenge, there are also barriers which would need to be overcome for a solution to be successful. Fundamentally, cultural and behavioural changes in law firms and client businesses would be required to help understand the need for greater data literacy and its importance.

Aside from the obvious impacts such as time delays and inefficiency, there are other longer-term impacts on the legal sector's reputation that should be considered. This lack of data transparency builds distrust between the client and the law firm which will likely worsen over time. As a sector, this feeling of distrust is amplified and making a change in the ways in which we communicate these data requirements as well as the data itself can help to build solid client and firm relationships. A lack of data transparency also means that there is no way to learn from the data which ultimately limits growth, learning opportunities and progression for both parties.



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## Legaliscious Setting the scene

Solving this challenge can not only improve the overall client and firm relationship, but it can also provide better insight for project management and overall processes. It can help to identify areas of best practice and lead to new and missed opportunities for both clients and law firms. It can help measure legal processes by benchmarking data allowing for systematic improvement going forward. Ultimately, it can help to improve the overall reputation of the legal sector through leading innovation and contributing to the idea that the legal sector is no longer an outdated industry.

Although data collection is nothing new, better understanding the specific data requirements clients have is something that is often overlooked leading to general assumptions being made. Tools such as PowerBi and other forms of dashboard applications are helpful to portray data in a meaningful format, yet this is only useful if the data displayed is actually needed or requested by the client. At current, a solution to help firms initially understand and identify their clients particular core set of data requirements, is missing. This means that the law firm is unaware of what they need to track, analyse and report, leading to the issues mentioned previously.



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## Legaliscious The solution

Law firms can add real value to clients by presenting useful data transparently, proactively and succinctly, ideally in a single place (as a single point of truth). This could be developed into a neat dashboard mechanism using tools such as Power BI.

Allocation of Work & Cost - Who is doing what work, and at what cost?

Non-billable Time - Clients could enjoy better oversight of how efficiently firms are being run, and what teams are doing

Types of Documents - Clarity of what is being produced, house templates and styles are being built, ensuring 'wheels aren't being re-invented'. Ultimately, to link spend with outcomes and value add

By leveraging pre-existing technology, law firms could better articulate key data, so as to build out relationships with their clients around principles of transparency, efficiency and near real time reporting. The client would benefit by being able to share the data with other internal stakeholders and be able to use it to make informed decisions about how they use their external counsel. This would have the benefit both to cement key lawyer-client relationships, and further to help each respective business (client and law firm) on their own processes and efficiencies too.



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## Legaliscious The solution

### Our target audience

We would expect that law firms are the target audience in the traditional sense of the phrase, in that they will be the ones subscribing to and integrating this technology into their practices. However, it is important to note that they would be doing so primarily to service the needs of their clients.

It should be noted, however, that clients, including in-house counsel/GC's, are not the only stakeholders who would benefit from such a solution. CFOs, analysts, HR, deal partners and others would all be able to realise tangible benefits from access to clear, holistic, data-driven insights.

A common need for both law firms and clients is the desire to understand and evidence the added value law firms are providing. This dovetails the very reasonable need of the firm's clients to demonstrate to internal stakeholders such as CFOs, management, etc. that their external legal spend is good value for money. Clients will also want to ensure that (1) their advisors are both being transparent in the work they are conducting and billing for, and (2), they are doing that work as efficiently as possible. The right data enables clients and law firms alike to take a clear, unobstructed look at what work is being done and it highlights any potential bottlenecks or inefficiencies.

That data, if analysed correctly, can also provide a great deal of non-legal value. For example, data regarding which jurisdictions have historically constituted the most resource-demanding regulatory environments can inform a client's international strategy. A clear view of the true diversity of the people working on your matters can be incredible valuable from a social perspective. The right data unlocks far more than just legal value.



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# Legaliscious

## The business case

### Current state

Conversations between law firms and clients occur in a data desert. As a result, clients don't currently have the evidence they require to understand any value add currently being provided but the law firms they work with.

### Desired state

Data driven law firm-client conversations as a means to continuous improvement of service delivery and relationship

### Objectives

Develop a mechanism to bridge the gap between current state and desired state by identifying the client's data needs and providing real-time access to the client

### Users

Law firms + client (including in-house counsel/GCs) + the client's key stakeholders (CEO, COO, CFO)



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# Legaliscious The business case

## User needs

### Data Literacy

Low among law firms & in-house counsel/GCs. Neither group know what data they have nor what they could / should / can have, nor how to acquire / make use of it. High among the client's key stakeholders (e.g. CEO, COO, CFO).

### Data Availability

Law firms & in-house counsel/GCs possess some, but not all data both need. E.g. possess DMS + billing data, but lack context metadata (i.e. time per total task relative to task value).

### Data Architecture

Law firms & in-house-counsel/GCs struggle to map their BAU processes and define how to measure performance, and in turn, architect what data to capture about what, when and where and why in their processes.

### Data Driven Decisions

Without the above, data driven decision making required by GC stakeholders impaired or impossible. Law firms unable to benchmark current state in order to define desired state, and in turn measure process improvements against both.





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## Legaliscious The business case

### Relevance to other business strategic objectives:

#### For law firms

Struggle to measure status quo of current state process. Without this, can't benchmark solutions or improve processes vs. current state. Increased breadth + depth of data collected for GCs, useful in solution to this problem

#### For clients

Want more data about value for money re GC and GC's external counsel. Greater data will inform this conversation, and enable GC to be a deal-making business partner not a deal-breaking cost centre

### Options assessment:

#### Do nothing

Law firm + GC conversations remain a data desert. Inability to improve performance on either side and demonstrate value remains impossible or impaired

#### Do something

As a minimum, conduct groundwork exercise described here to quantify the problem-solution space and possible avenues for a product and / or service based solution



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## Legaliscious The business case

### Funding

Law firms would likely need to be the major funders. Given the benefits for clients – cost sharing mechanism could be an alternative – running a headline campaign for law firms spearheading the solution and some of their key clients. It might be possible to take a Reynen Court style collective approach? In particular, given this is for the benefit of clients across the legal sector.

### Making Money

Upon launch, the solution would begin generating its own revenue in a sustainable and scalable way. The nature of the solution lends itself to a license-based revenue model, though if it were appropriate to do so, we could explore producing and selling data-driven industry insight as a supplementary revenue stream. Law firms that see the value in offering something more to their clients and unlocking data-powered insights on their own operations, would subscribe to the solution and pay a fee for doing so. Savvy clients will begin to insist that their external advisors use this technology, thus accelerating adoption and contributing to the financial stability of the project



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# Legaliscious

## The business case

### Costs

Time and money costs associated with:

- Running a client listening exercise to identify the data points clients want to capture
- Someone being hired/instructed to assist with the capture and collating of data
- Building data visuals/dashboard (if internal resource used)
- Cost of purchasing a data visuals or dashboard tool to the extent one is not already available within the firm

### Benefits

The client listening exercise may identify other areas in which the law firm could improve their service

Data captured will allow law firms to gain a deeper understanding into what work is profitable / unprofitable and why and with whom each type of work originates. This could form the basis for a process improvement project.

The data could also help the firm understand the true cost of legal jobs to be done. This would unlock true value pricing which is something clients want but is currently hard for law firms to deliver.

It will also help to minimise write-offs and improve profitability by encouraging data driven decision making.



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# Legaliscious Implementation

We see implementation as having 3 key stages...

## Information gathering / client workshops

Identify common data points between clients that drive value-add opportunities, through a combination of surveys and more in-depth client workshops. We see these workshops as a key part of engaging client stakeholders with our idea. They will be able to bring their own ideas and ensure the outcomes are client led.

## Information gathering / client workshops

Whilst this will be driven by outcomes from the workshops, we see the maximisation of existing data captured in workflows as a priority. It will be important for lawyer buy in that the demands on their time are minimal. As an example idea:

Agreement Versions in DMS systems.

- (a) Low number of versions = candidate for document automaton or a precedent process.
- (b) High number of versions = may require simplification / opening positions to be reviewed.

## Reporting back to clients

We plan to agree a common interface for dashboard or PDF reporting, with a focus on visual information. The preference would be existing systems such as Power Bi to avoid on boarding and IT stakeholder hurdles. We want our solution to be API driven and as platform agnostic as is technically feasible - for more sophisticated clients, we could plug directly into their own modelling or visualisation systems. The sell to law firms will that we will connect the data you have with the outcomes your clients want.



Barriers	Success Criteria
Initial cost outlay for firms	This can be recouped by charging for access or co-developing with clients so they take on some of the cost.
Initial data capture may be slow and challenging	Data capture should be carefully managed with ongoing review and feedback between law firm and client. Input could be received from other organisations and clients who have gone through similar exercises.
Poor “data literacy”	Training on the basics of data literacy should be provided to both law firms and clients to understand the data available and how to interpret it.
Cultural and behaviour change (law firms)	This will require a mindset shift to being a data focused organization and becoming proactive. Small and incremental change is advised. It is important to bring fee earners along for the journey, explaining how it will benefit them and giving them ownership of the data captured and final dashboard/tech solution. Data literacy training (see above) should form core training for fee-earners.
Initial cost outlay for firms	This can be recouped by charging for access or co-developing with clients so they take on some of the cost.



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## Legaliscious Implementation

### Confidentiality, GDPR, ethics walls etc.

The solution must only collect, process, and store identifiable data where absolutely necessary. A personal data inventory should be completed, identifying the data fields that contain sensitive information, and exploring the reasons for collecting and storing this information within the solution.

There are a number of techniques that can be used to tackle these issues:

Pseudonymization e.g. scrambling, encryption, masking and tokenization, reversibly remove some, but not all, of the data from the dataset.

Data anonymization irreversibly removes specifically identifiable information from the data in question.

Generalization could be used to transform exact values into ranges.

Encryption would be useful when the data is either "in transit" (being moved from one location to another) or when it is "at rest" (when stored on a device or in an app).



Measuring success with a project such as this can't be done by comparing progress against KPIs and other metrics. But, there will be a number of indicators that prove to both the law firm and the client that the project is having the benefits they hoped it would.

### Indicators of success for law firms:

- Better metrics for innovation project management
- Data backed case studies
- Winning more pitches
- Good press and awards
- Minimise write offs
- Identify areas of best practice
- Higher value work for junior lawyers

### Indicators of success for clients:

- Transition from cost centre to value add
- Justifying money spent
- Lower costs
- Internal time savings and efficiencies

### Indicators for success experience by both law firms and clients:

- Improved relationships
- New opportunities
- True value based pricing
- Easier stakeholder management
- Identify internal



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