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FEATURES

INTERVIEW

From Lawyer to CEO

We talk to Shilpa Bhandarkar, CEO of CreatelQ, in a wide-ranging interview

ARTICLE

Career Story

Mollie Tregillis, Director - Legal Optimisation at law firm MinterEllison tells her story

#NoWar

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Insight into the future of law

The Legal Technologist

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Legal Operations Index

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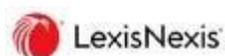
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users

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average reduction
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drafting time

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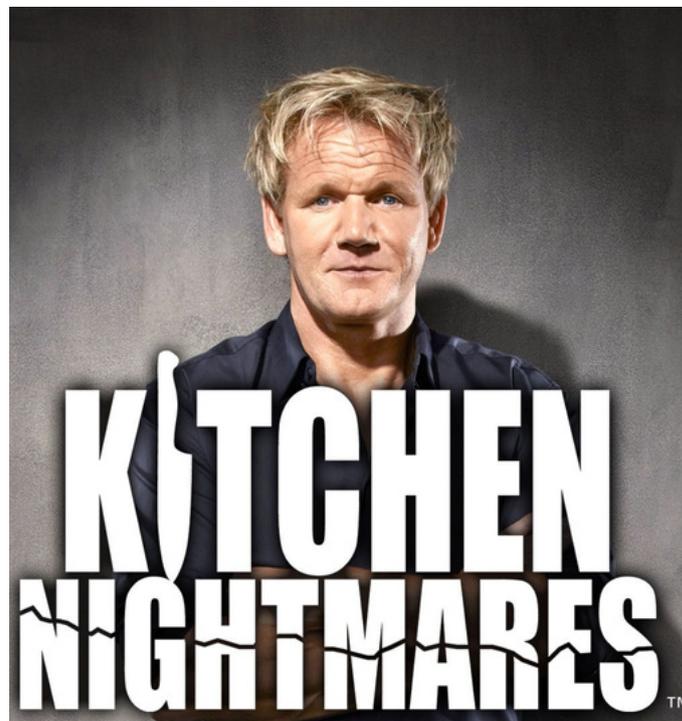
Europe

What Gordon Ramsay's Kitchen Nightmares can tell you about implementing legal tech

By Marc May

I watch *Ramsay's Kitchen Nightmares* quite often. For those that are unaware of the premise of the program – it is basically Gordon Ramsay (a famous chef) parachuting into struggling restaurants and putting them back on the profitable path again. If one was to watch superficially then you can absorb the drama – but I enjoy looking at it to see the real-world business issues restaurants have. At this point you may be wondering how this could have any bearing on legal/legal tech – I'll explain.

One of the misconceptions about legal tech tends to be that just buying some licenses and starting to use it will immediately provide incredible inefficiencies – without any real analysis of the processes involved or how people will use it. If I go back to the Kitchen Nightmares analogy – it would be like Gordon coming into the struggling restaurant and delivering them a new kitchen – and then saying job done. It would undoubtedly be one of the shortest episodes in the series! While equipment may be part of the issue that particular business is having it undoubtedly isn't the sole issue – which is usually related to people or processes.



Quite regularly in the programme restaurants fall into the trap of providing too many choices for the customer – effectively becoming a jack of all trades when it comes to delivering the food, rather than being a master of some. Gordon usually comes in and refines the menu, making it easier for the customer to choose and ultimately for the kitchen to make. For this one – imagine the customer to be a user of tech in a legal setting.

One scenario could be this – a legal user has access to numerous applications in their day to day work. There are quite a few of them but the user doesn't really have the time to delve into what each does – and for those they do they probably only skim the surface of the functionality. Even if there were devoted resource to inform the user what they do – it'd still take the user time out of their day to day work to improve their knowledge and skills of the relevant applications. So in essence, lots of great applications have been bought by the company/firm but they are just used in a limited way. Refining the options would therefore be useful as users would get more use out of less tools.

Another scenario could be this – a company decides to implement a contract lifecycle management tool and decide they want to use all their current templates without harmonising or standardising them. They add all the different variations used across the company – effectively replicating their current position. In doing so, it becomes clear that users are storing agreements of the same type but with different names, and potentially even different data. One man's 'NDA' could be another's 'Confidentiality Agreement', and likewise with 'Statement of Work' and 'Work Order'. It also becomes clear that too much choice means users are unsure which type of agreement they should be generating. All of which negate in part the efficiencies that the company is looking for. Therefore by refining down the menu options – and keeping it consistent across the organisation – tech will amplify those improvements in process.

Another issue that comes up in the show is that food is not good enough – some customers never go back while others return their food which leads to re-work for the restaurant. While this doesn't have the greatest analogy in the legal setting – it should be noted that the contract being drafted is usually the product a customer wants (in law firm setting) or the product that needs to be agreed with a counterparty in the minimum amount of time (in the in-house setting). In adopting a tool that either automates contracts or improves contract lifecycle management it merely makes more efficient the generation of a first draft defined by the company or law firm's own templates. Those templates are the result of legal knowledge poured in to make the contractual 'recipe' for either a client-specific event or a business need. Therefore if bad contracts are automated it just means that bad contracts are produced – "rubbish in, rubbish out" as they say.

A badly drafted contract, like bad food in a restaurant, will have a negative impact on the business. A CLM tool in this context just delivers the badly drafted contract quicker. The generated contract would undoubtedly prolong negotiations as there would be more points to negotiate, tracked changes to review, etc. The legal function of the business would be tied up with negotiations that could have been avoided – negating the benefits of a generating a quicker first draft.

Another issue on the programme tends to be around the people involved in the process – either they aren't motivated, aren't leading effectively or just aren't skilled enough to do what they need to do. These issues aren't

limited to restaurants – they undoubtedly have impacts in the legal world too. Lack of motivation has the potential to lead to working around the process in place – and that the tech seeks to enforce. Equally, it may also impact quality with the acceptance of lower standards of output regardless of approval processes in place driven by tech. So clearly – while tech has the best of intentions – the 'people' element is clearly something to keep tabs on.

Regardless of what tech is implemented, if users don't have the skills to use it, or use it effectively, then those efficiency gains will again be eroded. For example, Gordon could have added the latest state-of-the-art appliances into those kitchens he visited – but ultimately if the recipients don't know how to use it it'll just remain on the shelf. Even the most commonly used applications like Word and Excel will only be used with a fraction of its functionality. So the more complex it is the more preparatory work is required to deal with the change.

In conclusion, there are three core components to any tech implementation "people", "process" and "tech". While it is easy to jump straight to the 'sexy' part of buying the licenses and publicise the adoption of the latest tech – the reality is that it just amplifies the hard work done on the comparatively 'boring' stuff of reviewing/refining processes and preparing for change management. If there is one thing to be learnt from *Ramsay's Kitchen Nightmares* it that efficiencies are gained by simplifying processes and motivating and upskilling employees. Any tech added to the mix merely amplifies the gains from the already well-oiled machine – it isn't the efficiency gain in itself.

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Marc May

Founder/Managing Editor
Legal Technologist

Implementing Document Automation: A few unexpected benefits

Charles Drayson is a UK lawyer who has used document automation for 20 years. He has worked for large law firms, corporate legal teams, and has automated legal and non-legal documents. He writes for Legito to share his passion for using automation to get work done.

Here's a situation you might recognise: an organisation sells a range of services that need different contract terms. Customers might buy more than one service. How do you create a contract which contains all the necessary clauses in one document but none of the irrelevant ones? That was my first task for document automation, and it seemed like a good project. I had a trial version of the software, and I started drafting.

We had thousands of customers served by a sales team of more than fifty people. We had a Word document for each service, so customers had to sign multiple documents. Sometimes, the salesperson would use the wrong documents. Sometimes, the documents did not even look like they came from the same company. It was a mess, and we needed to do it better. It would take a long time to get to signature. Often, the services went live before we finished sorting out the contract terms – which is never a good idea.

I built a template that allowed a salesperson to select the services from a menu. I used the answer to control the clauses in the contract.

I demonstrated version #1. That's when the trouble started. The sales team complained they couldn't select the services they needed. I discovered sales teams used different names for the services, depending on which salesperson you asked. How could we have so many customers without a consistent name for the services? I talked to the Finance team. They created invoices, so they must know the range of services to list

them on invoices. They told me that the Finance system used codes (not names) for each service, and the Finance team had to interpret what each salesperson intended when a new customer contract arrived for billing. It was educated guesswork.



The contracts included an Order section, where we stated the services and the fees. Before automation, contracts occasionally omitted some fees altogether because they were forgotten or misunderstood. Document automation created an opportunity to make sure the menu of services also forced the relevant fees to be included in the contract. The Finance team told me which fees were supposed to be collected. However, the sales teams had been giving proposals to customers for fees that did not align with the services. Unsurprisingly, people got grumpy when the contract tool started to generate fees that were not the same as those in the sales proposals.

Why am I telling you all this? It took me a few weeks to learn how to use the document automation software and create the first versions of contract templates. It took me much longer to develop the templates to a stage where everybody (Sales, Finance, customers) could agree that the templates created 'correct' contracts. It wasn't a legal problem. It wasn't a technology problem. We were trying to automate a business process that was not consistent or reliable. We were automating rules that were not uniformly applied or recognised. Deploying automation forced us to recognise the problems.

I was expecting to use document automation to reduce the cycle time to get customer contracts signed. That was the return on investment. What we achieved was something altogether different and unexpected. We stopped losing revenue from missing fees accidentally omitted from contracts. We ensured the sales team, the finance team, the operations team and the customers all had the same understanding about what we would deliver and invoice. We stopped annoying customers with incorrect invoices and credit notes. We forced our internal teams to agree how things should be done. Generating a contract with document automation became a chance to identify errors before we put them in front of customers.

Since then, working with different organisations, I have lost count of the business or operational problems that we discovered and fixed because document automation forced us to look more closely at what we were doing. Those problems were never part of our return on investment calculation because we didn't know they existed. It's a welcome bonus when we fix them. Automation can be like that.

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Charles Drayson

North America

Legal Tech Learning

Law students get early exposure to legal tech through new Capstone Project at the University of Wisconsin Law School

By Maria Sobrido & Wilson Fay

The legal community as a whole is rarely referred to as early adopters of technology, and most aspiring lawyers are not exposed to the world of legal tech until a few years into practice, if at all. However, a group of third year law students at the University of Wisconsin is gaining early exposure to legal tech through the University's new legal tech capstone project. The capstone provides students with exposure to legal technology early in their careers through hands-on experience working with industry and campus leaders on legal technology during a semester long externship.

One of the first programs of its kind, the capstone pairs students with a variety of legal tech innovators. Through their externships, students explore both emerging legal technology and alternative career paths. In its inaugural semester, the capstone has paired seven students with five legal tech partners in areas including contract AI and computer assisted legal research. The capstone hopes to build on the success of the pilot program and expand future offerings to more students at the University of Wisconsin Law School in the future.



A main focus of the capstone is exposure to disruptive technologies early in the legal training of the students involved. The capstone is by no means meant to be a sales pitch for the services the partners offer, but rather an introduction to their legal technology offerings as a whole through hands-on experience working with different practice groups that are developing and refining the products. Exposure leads to comfort in embracing and utilizing the tools that technology can offer to lawyers. The comfort and exposure to legal technology gained through the capstone is designed to promote an environment where the students think deeply about how technology can improve the legal industry and access to justice. As the students embark on their own legal careers, the hope is they can bring their experiences from the capstone and their knowledge of disruptive legal technologies to their practices and expose other attorneys to legal technology developments as the students progress through their career path.

However, the externship is only one component of the capstone program. There is also a classroom component, in which students explore a variety of implications of legal technologies through focused discussions. Often guest lecturers join to lend their experience and perspectives to the discussions on the legal, ethical, business and social issues raised by the technology. The capstone has leveraged its resources

and connections to industry and campus leaders on legal technology who discuss how AI and other technology is affecting the legal industry and how lawyers can use it to their benefit.

One such guest lecturer spoke about a website being designed that would allow users to enter their name into a database and find out if there were any evictions, suspended driver's licenses, criminal records or more that could be removed. This is a free service that has the potential to impact thousands across the state of Wisconsin. The directors of the service, who won a sizeable grant, do not have a tech background, but have found their way to use technology to broaden their reach and assist more people. The capstone program aims to show law students creative ways to use technology to expand access to justice and how it can be a tool for lawyers.

A recurring theme being discussed surrounding the use of legal tech is that these are tools for lawyers and are not meant to be replacements for lawyers. This statement may seem innate in a magazine embracing legal technology, but many young lawyers fear training and building their own replacements. The capstone wants to help change that narrative by broadening the perception of emerging legal technologies to be viewed as a tool to help young lawyers be efficient and innovative.

One student has been placed with a company using machine learning for contract review. Despite a healthy dose of initial skepticism, the student has seen how effective and practical the tool is. Having already spent hours doing document review for complicated transactional work, it was quickly clear how efficient a tool like this one is. Without having done this work, this student may have never (or at least very slowly) overcome the reluctance to utilize and rely on technology.

Another student is working with a legal technology company to develop a citator that relies on software rather than lawyers to determine a case's treatment. This student quickly learned that it is unlikely that in the (near) future, technology will be able to completely replace lawyers despite his initial optimism about the efficiency that can be achieved by removing the human element from a citator. When creating legal technology to make lawyers jobs more efficient and easier, lawyers will likely always need to be involved to ensure the technology properly interprets and applies the law. Through the first two months of the pilot program, each student has come to understand this reality in one way or another, and the fear of replacement has slowly dissipated.

From the student perspective, law school is a cerebral experience and is not rooted in practical skill building. The capstone is a chance to explore the possibilities of legal tech hands on, allowing students to explore the possibilities of legal technology and apply that knowledge in personalized ways. The current students, all to graduate within the coming months, expect to work in a wide array of practice areas and with different types of employers and career paths. Upon graduation, these students will bring with them their experiences from the capstone, and with that, a greater comfort and familiarity with legal technology than most graduating lawyers.

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Maria Sobrido and Wilson Fay are both third-year law students at the University of Wisconsin Law School and currently enrolled in the University's new legal tech capstone project.

Millennial Lawyer's Guide to Compliance in the Cloud Environment

By Bojana Krstic

Millennial lawyers work in a much different environment than their older counterparts. While 20 years ago, clouds were something that only existed in the sky, today, cloud-based technology is the new normal.

The cloud offers lawyers an abundance of benefits, including increased mobility, improved data security, and increased efficiency. However, there are many risks that cloud technology brings as well. For instance, there has been a recent uptick in the number of cyber-attacks, some of which have targeted law firms. As these attacks often expose sensitive data to the public, compliance laws and regulations have become stricter than ever.

That's why lawyers need to learn how to mitigate cybersecurity threats while also staying compliant.

To help millennial lawyers navigate the compliance aspects of cloud computing, below is an overview of 5 cloud compliance issues.

1. Complying with cloud security regulations

As the cloud's popularity has grown, so has the number of organizations that have set security standards for the technology. The rapidly increasing number and complexity of federal regulations only add to the

challenge of compliance. The General Data Protection Regulation (GDPR) is only one in a long line of regulations that specifically affect millennial lawyers and law firms.

For instance, the Payment Card Industry Data Security Standard (PCI DSS) is a set of security standards for organizations that accept credit cards. The requirements outlined in the standard help to ensure that credit card information is securely stored. Because lawyers often handle client information, they are required to comply with the PCI DSS. Fortunately, many of the cloud providers have adjusted their services and offerings to accommodate the standards. This can make compliance easier for millennial lawyers.

2. Ensuring data privacy

In addition to complying with the above regulations, lawyers must also ensure that their use of cloud-based technology does not violate their clients' privacy rights. Because these laws vary on a state-by-state and country-by-country basis, lawyers must ensure that they comply with the most stringent regulations. Failure to comply with these regulations can result in legal malpractice actions.

Lawyers must also comply with any exchange or data use restrictions imposed by third-party vendors. Firm

lawyers may be required to share confidential firm information with third-party vendors who perform services on their behalf. For example, lawyers must share information with data hosting vendors, telecommunications providers, document processing vendors, and other providers. Each vendor is required to sign an agreement requiring them to maintain the confidentiality of the information they receive.

3. Carefully choosing data storage solutions

Because of the nature of cloud computing, data is often scattered across numerous servers. This means that it is less secure than data stored on a single secure server, and the ultimate physical security of the servers may be outside the lawyer's control. In order to comply with data privacy regulations, millennial lawyers must also ensure that their data is stored in countries that are compliant with the laws and regulations governing that data.

For instance, some countries have privacy laws and regulations that prohibit storing certain types of data within the country's borders. As such, lawyers must ensure that the data they store in the cloud is hosted in a country that complies with these laws and regulations. Cloud technology has many benefits, but it also comes with complications. The key is to balance these risks and rewards.

4. Ensuring proper data archiving and destruction

In addition to ensuring that data is adequately stored, lawyers must also ensure that it is properly destroyed. Destroyed data must never be recoverable by any means. However, some data needs to be retained for a certain period before it can be destroyed. Generally, lawyers must keep their clients' data for approximately seven years. However, retention periods could vary depending on location and industry.

To help ensure proper data archiving and destruction, lawyers should develop and implement data retention policies and schedules. These policies should outline which data may be destroyed, when destruction should occur, as well as how data destruction should be carried out.

5. Being transparent in case of a data breach

Even if you take all the necessary measures to secure data, a data breach can still happen. In that case, lawyers are also required to notify individuals in the event of a breach. There is no one-size-fits-all template to use in the event of a data breach. Instead, each lawyer must evaluate their obligations under federal and state law.

Generally, the notification should include a description of the breach, how the breach occurred, and steps that individuals can take to minimize the damage.

If you are considering a data breach notification, you should work closely with your IT department and your malpractice insurer.

Conclusion

These days, many law firms choose to store and manage data in the cloud. Cloud-based technology offers millennial lawyers a wide range of benefits. However, along with these benefits come compliance requirements.

Millennial lawyers must ensure that they comply with these regulations or face penalties that can have significant (and negative) consequences.

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Bojana Krstic

Bojana Krstic is an author covering the topics of data retention, compliance regulations, and ediscovery. When not writing, she enjoys hiking, swimming, and watching and reading thrillers and science fiction.

Interview

Interview with Shilpa Bhandarkar

In this issue Marc May (MM) interviews Shilpa Bhandarkar (SB), CEO of data-centric CLM solution CreateiQ, designed and developed by global law firm Linklaters.

MM: Could you tell me a little bit about your current role?

SB: I'm the CEO of CreateiQ, the CLM platform designed and developed by Linklaters. My role is typical to that of any CEO of a tech start-up. I'm responsible for the strategy and growth of our platform, for delivering on our business plan and for all the operational processes required to do that. I spend most of my time talking to people – either clients or my team – and the rest in between whiteboards and spreadsheets (can't live without either!).

The only added dimension is that we are backed by a law firm – so I am in effect running a business within a business. I report to a Steering Group that acts as our Board.



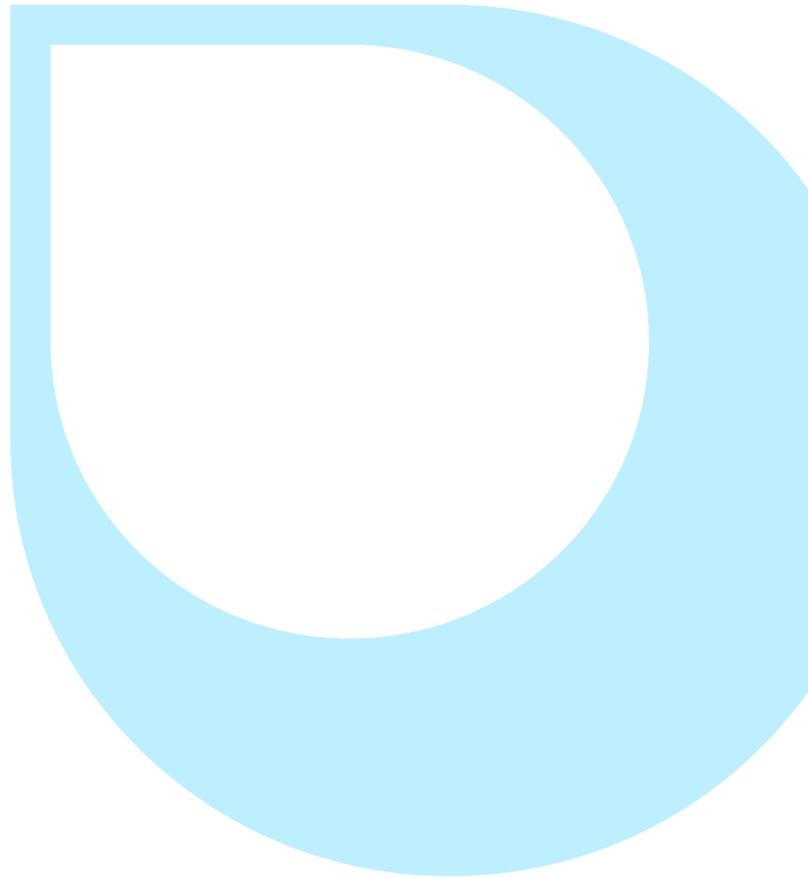
MM: I understand you started off as a lawyer, right? How does your previous life as a lawyer and current life as a CEO compare?

SB: Yes, I started my career as a project finance lawyer at Linklaters - although I have spent more of my professional life outside the practice of law than in it. I initially moved to business management, first as the COO for our India Practice and then our Africa practice. I enjoyed building and managing new, emerging practices.

I then left the law entirely, co-founding a mobile app company, Coo, with a friend from business school. Coo was a communication and calendar app for parents of primary school kids - it had nothing to do with law. I was the non-technical co-founder and this was my first experience with tech and product development. I learned everything from the difference between UX and UI design to the beauty of working in sprints.

All of that was entirely new to me until then but from then I was hooked. When we sold Coo, I knew I wanted to stay in tech but also wanted to leverage my experience in legal services. I therefore moved to legaltech, before eventually returning to Linklaters in 2018 as its first global head of innovation.

In the summer of 2020, in the middle of the first wave of the pandemic, I moved roles to take on responsibility for CreateIQ. This role has brought together all my previous experiences - the practice of law, legal management, start-up, legaltech. Safe to say that it is entirely different to my life as a junior lawyer, but that experience has definitely played a part in where I am now.



MM: I imagine you learnt a lot from running your tech company previously before taking on your current role. Were there any lessons learnt from the previous venture?

SB: Definitely. I learned about the importance of product-market fit - about constantly getting feedback from clients and then iterating the product based on that feedback, always with one eye on how much money you still have in the bank to prove your business case. I learned how to hustle - definitely not something I needed as a junior lawyer! I also learned to take rejection less personally. I remember standing outside a primary school in the middle of Shoreditch, asking parents lined up to pick-up their kids if I could take 5 minutes to show them the app and get their thoughts. Bucket load of rejection on a Thursday afternoon interspersed with some fantastically useful feedback - typical start-up day!

MM: CreateiQ is a business within a business at a law firm. In recent years there has been a number of law firms forming businesses in this way. Is the future of law firms to monetise not only legal services but also tech elements too?

SB: I think it depends on both the law firm and the type of tech solution you're talking about. Personally, I don't think law firms are, or should be, building tech solutions for the sake of creating new products – that feels like something better left to a tech company.

The obvious question then is why Linklaters chose to develop CreateiQ. Well, it is because there was a very specific unmet client and market need for a negotiation (rather than automation) platform. The design of any meaningful solution needed deep and up-to-date knowledge of how contracts are drafted and negotiated across practice areas and product types – which is where being surrounded by lawyers works to our advantage!

CreateiQ's USP is the design of a workflow for contract negotiation that is tailored to how lawyers (private practice and in-house) actually work, while being able to give businesses the contractual data they need. Because we have access to practitioners and clients negotiating thousands of these contracts day in and day out, we are able to design and adapt workflows to suit our target audience, whether that is a derivatives lawyer negotiating an ISDA Master Agreement, a banking lawyer negotiating a bilateral facility agreement or a commercial lawyer negotiating a services agreement.

To your broader question of should law firms be using tech and leveraging tech to become more tech-enabled in how they deliver their services and potentially generate revenue from that? Yes, definitely.

MM: What is the USP of CreateiQ?

SB: Structured data – creating it, giving our users access to it, giving businesses the ability to leverage it. It is at the core of our product. We call it a CLM legaltech tool because that's the easiest category to put us in. However, at its heart, it is an enterprise data and technology solution that happens to use data created in the contracting process.

There are a number of existing AI solutions in the market at the moment. However, our current challenge is that we still need to invest a substantial amount of time to train up the algorithms for particular contract types or particular languages. Our solution ensures that you are creating and have access to clean data so that the algorithm can then do its thing.

And that's why we have a very structured approach to how we capture data in CreateiQ, from the contract creation process all the way through to negotiation and all the audit data created in between. You can download your contract as a Word or PDF file, but the real value is downloading your contractual terms in machine readable JSON – because that then means any part of your business can access, use and manipulate to make better business decisions.

To take an example, if you're a property company, your finance team needs to know the aggregate value of all the outstanding leases and the security deposits, including the currencies they're in. They likely need to know in which countries those properties are based and when they are coming up for renewal. If you have signed leases in countries that are now impacted by the pandemic or any other macroeconomic factor, then likely your risk and compliance team need to know. All of this "data" is available in your portfolio of lease agreements. What CreateiQ does is make that available to you and your business by clicking a few buttons rather than having to trawl through thousands of documents manually - assuming you can even locate them in the first place.

MM: I think there has always been a difficulty up to now with structured legal data and accessing it in a way that can provide accurate business decisions. CreateiQ seems to solve some of these issues with its data-centric approach.

SB: Definitely. In the past it was difficult for companies to access what was in their contract portfolio, or even know if it was complete. Couple that with a constantly changing regulatory environment where global companies not only need to keep track of different regulatory regimes and how they interact with each other, they also need to know how their contract portfolio sits across and interacts with them. Even with the best

will in the world you're not going to be able to do that manually. You need technology that's designed to give you access to this contractual data in real time, in a format that's easy to manipulate and analyse, with the confidence that it is accurate and complete. CreateiQ does all of that.

MM: I know you were in a legal innovation role with Linklaters before this one. What was your greatest lesson learnt from that role?

SB: The greatest lesson was learning to stay focussed on the problem you are trying to solve. Much of the innovation role was about identifying and using the right processes and technologies to make things more efficient for our lawyers. There were three parts to that.

First, to clearly identify and articulate the pain point you are trying to solve. This is the obvious first step to finding the right solution but does take a lot of time and drilling down into the detail of how lawyers work. Second was to cut through all the sales pitches from legaltech companies and other vendors to understand the problem they were trying to solve – to see if there was any genuine overlap between our need and their services. There's a lot of what feels like "shiny new toy"-syndrome in legal at the moment. It's in everyone's interests to cut through the hype and be honest about whether there is the right fit. Without that, there isn't any chance of adoption – and that hurts both the buyer and the vendor in the short term, and the industry as a whole in the long run.

Learning to stay focussed on the problem we were trying to solve, which often had quite mundane solutions (a change in process, using something already in the tech stack at the Firm etc) and not being enamoured or distracted by what felt like all the glitz and glamour of the growing legaltech space was a good lesson learned!

MM: What does the future lawyer look like to you?

SB: I don't think the future lawyer looks hugely different to the lawyer of today. At the core of the role is delivering accurate and commercial legal advice. How that advice is delivered will likely change – and perhaps that's where the new skills come in.

The way legal advice is delivered has changed a lot thanks to technology – from faxes to emails, from online data rooms to data extraction tools. This will likely change at an exponential rate going forward and I therefore think lawyers will need to be a lot more adaptable in the way they work. They will hopefully channel some of the creativity they deploy to structuring new legal structures and solutions, through to designing ways to deliver their work product and legal advice. Imagine a world without 200 page due diligence reports and all of that information shared in a more visual and interactive way.

MM: What advice would you give to anyone plotting the same career path as you?

SB: My career has evolved rather than been plotted in any meaningful way. With that disclaimer I would say first, get to know yourself – know what motivates you, know what makes you tick, know what makes you happy. Second, combine that knowledge of yourself with a healthy dose of curiosity and being open to opportunity, generally with an eye to the "where do I want to be in 5 years" question.

As an example, after selling Coo, I knew I loved the start-up and tech space. I also knew I wanted to come back into legal given that's the sector I knew best. But I was still unsure about what role was right for me. I went into workinstartups.com, searched for "legaltech" and found a maternity leave cover role for a Legal Network Director at Lexoo. It seemed like the perfect opportunity to test the waters – a time-bound role at a fast-growing legaltech company before I moved to Amsterdam to join my husband. What was meant to be a short-term (4 month) role lasted well over a year and set me up really well for my move to the innovation role that came after.

I wouldn't describe myself as a risk taker, but because I've spent the time working out what levers are available to me, I'm more risk aware and risk tolerant than most. I'm generally unafraid of change and trying new things because I'm aware of exactly why I'm making that change and what I stand to gain and learn out of it.

MM: Thanks Shilpa

Career

India Preston

User Adoption Lead at Lupl

In this issue India Preston, User Adoption Lead at legal tech company Lupl, explains her career story and let's us know the advice she wish she'd had when starting out.

I'm the User Adoption Lead in the Customer Success team at Lupl. What does that mean?! Lupl is the collaboration platform for legal. The platform makes it easy for lawyers, clients and business professionals to work together by providing a shared workspace for all the documents, communications and project management functionality needed by legal teams. We recently launched Lupl to the public (for free!) and we have ambitious plans for its future. At its highest level, it's my job to make sure that our customers understand what Lupl is and how it compliments their workflows, as well as to vouch for their business needs as we develop our platform. I was one of the first four employees at Lupl. Building our company has been the most exciting year in my career to date!

I grew up assuming that I had three career choices – medicine, finance and law. Law made sense to me – I was ambitious, and English, History and Latin were my best subjects. I could never have predicted then that I'd be where I am now – building a legal tech startup from the ground up



with a mission to change the way that legal professionals work together. I love my job, and I am constantly inspired by the deeply talented people that I work with. What we're doing is creative and brave, but it's also fundamental to the progressive change that is storming the legal industry.

My unusual career story definitely celebrates the things that haven't gone to plan! Following a Classics degree at Bristol University, I completed my GDL and LPC at BPP. Despite the highest grades and some close calls, I didn't secure a training contract with my chosen law firms. So I began by walking straight into a paralegal role at Linklaters. I worked incredibly hard and built up trust amongst my peers and the lawyers I worked with. Then I was asked to provide some one-off project management holiday cover for a small team that wasn't yet fully established, but would later become the Business Improvement team.

Despite being put forward for training contract interviews at Linklaters, I found myself accepting an opportunity to join this new group and embark on my first team building project. Over the next five years, we built a Legal Project Management (LPM) team from two people to twenty five. We founded the concept for the firm, proved its success and made ourselves indispensable. It was here that my interest in legal technology began. I was tasked to find out everything I could about advanced technology solutions, such as AI, to solve some of the core problems that I encountered each day. I interviewed a number of companies, and selected RAVN to sit with us to get to grips with the day to day struggles of document management, review and analysis. It was RAVN's first foray into legal, and the first step in their incredible success with iManage.

I left Linklaters when I relocated back to Bristol. My husband and I were looking for a change. From Bristol, I began to take on consultancy projects for law firms. It was the steepest learning curve of my career. I was totally alone, with no consultancy experience, but I loved it. I had to unpick some very complex and systemic problems in order to solve them, but it didn't take long to realise that I was building some amazing relationships, creating value and enjoying it. I consulted for nearly three years before taking maternity leave – and before Covid hit. When I was ready to come back to consulting, the world had changed. So I networked, I researched, I dug deep and reflected on the best bits of my career. Then, one day, I came across Lupl on LinkedIn. And despite an offer from another magic circle law firm, I took a leap of faith for something that I fervently believe in.

Looking back, there are three pieces of advice that I wish I'd been given when I was just starting out:

First – you don't need a professional qualification and a large pay check to be successful. Every person's version of success is different, and what it really boils down to is fulfilment. I was 'successful' working incredibly hard and barely eating a meal at home for years. But I'm much more successful now that I can exercise my creativity, mould my working hours to my family life and know I provide value to my team.

Second – opportunities will present themselves to you if you muscle into the right position to see, and

have access to, them. Don't hesitate to take opportunities and see where they lead. I spent years berating myself for not pursuing my dream job as a qualified lawyer. But now I understand that I made tough, unconventional decisions that led me to where I am today. I'm all the happier – and more fulfilled – for it.

Third – if you fancy an alternative career in legal, you don't need to be a problem solver. You just need to identify where problems exist. And they're everywhere! Understand why there's a problem, examine it, talk to everyone you know about it. Then go back to my second piece of advice, and make the most of it.

India Preston

User Adoption Lead

Lupl



Career Story: Mollie Tregillis

Director of Legal Optimisation at MinterEllison

In this issue Mollie Tregillis, Director of Legal Optimisation at Australia's largest law firm MinterEllison, details her background and advice for anyone hoping to follow the same path.



What you currently do and what you enjoy about it

I lead MinterEllison's Legal Optimisation Consulting practice, which assists in house legal teams improve operational efficiency, develop high performing teams and provide strategic client service.

What this means in practice is that we work with our clients to navigate major programs of change whether that is change relating to their people, processes, technology or all three. This work ticks all my boxes – people focussed, problem solving, huge amounts of variety and a great toolkit to draw on including design thinking, Agile methodologies, Lean Six Sigma, project management, data analytics and more.

It is incredibly satisfying to see teams adapting to the ever changing demands on in house lawyers and feeling supported and excited for the changes rather than feeling pressured or overwhelmed.

I also really enjoy working with an amazing group

of experts within MinterEllison, including our 70+ Legal Operations SMEs who are a tight knit, high performing team who love what they do.

How you got to where you are

I started my career as a litigation lawyer, but found myself more drawn to the project management aspects of large matters, rather than the legal issues. I then moved into a Legal Project Management role, which transformed into a Legal Operations role as this field first developed in Australia. From there I moved firms into a Head of Legal Operations role at MinterEllison reporting to the Chief Digital Officer and supporting the Disputes line of business.

There was increasing demand from clients for Legal Operations services and we found ourselves delivering this work as well as our BAU work (which was focused on optimisation for the internal legal teams). Due to this demand, we set up a centre of excellence to consolidate our focus on delivering client services – this is the Legal Optimisation practice that I now lead.

Along the way I have had a series of hugely experienced and supportive leaders who have recognised my drive and opened the door for new opportunities. I have also worked with great collegiate teams (which I think is common for Legal Operations teams – maybe because we all feel we have struck gold and found our dream jobs!) who have been consistently open to sharing insights and information, and collaborating on projects without ego. All this has been critical for the consistent enjoyment of my job, as well as my trajectory towards leading a consulting practice.

What advice you'd give others following the same path

Here are some tips I would give anyone looking to work in this area:

1 - Find your 'way' of working. There is such a diverse range of skill sets amongst Legal Operations professionals and all add something fantastic to the mix. I think knowing the way you perform best and seeking out opportunities to play to your strengths is key.

2 - Surround yourself (and/or seek out) great mentors, colleagues and supporters. There is such a wealth of expertise out there and in my experience, a real openness to sharing information and insights. Leverage this to work out where you want to focus effort in moving your career along.

3 - Keep empathy front and centre. This work only succeeds when we bring empathy in buckets. We are often talking about supporting major change within an industry that is still in many ways grounded in tradition and precedent. Change resistance will occur and in my view, bringing empathy into these discussions and projects supports getting towards the end goals faster, while ensuring the relevant team feels positive about the experience.

4 - Don't get overwhelmed. There is so much noise and hype, so much to learn, read, listen to, get better at. Don't try and take all this in. Ask yourself – are you good with people, do you love what you do, do you respect your team and feel respected, can you see a forward path of growth? These are important, the hype and noise less so.

Mollie Tregillis

Director - Legal Optimisation
MinterEllison

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