

# INSIGHT 2008

15 APRIL 2008 HILTON LONDON TOWER BRIDGE

INSIGHT 2008 is ILTA's third annual UK event targeted to professionals in the legal market. It is an exceptional opportunity to hear from leading technologists and business strategists, from the UK and the US, who will share their expertise on matters of great interest to the legal profession. This thought-provoking day with ILTA is offered in two tracks and provides substantive content targeted to CIOs, operational managers, lawyers, litigation support specialists and in-house legal departments.

## The specific sessions focus on:

- Practice Management Systems
- Digital Rights Management
- Outsourcing
- eDisclosure
- KM and Enterprise Searching
- "Crystal Ball" Technologies
- E-Billing
- ... and much more

Review the session agenda, familiarise yourself with our lineup of great speakers, and make plans to spend an enlightening day with ILTA, expanding your knowledge and connecting with valuable peers.



International Legal  
Technology Association

# AGENDA

- 9:00 – 9:30 **Registration, Continental Breakfast**
- 9:30 – 10:30 Track A: Session 1 – LITIG - Practice Management Systems  
Track B: Session 1 – Crouching Tiger, Hidden Dragon - Judicial eDisclosure Training
- 10:30 – 11:00 **Break**
- 11:00 – 12:00 Track A: Session 2 – Digital Rights Management - Your Rights or Their Wrongs?  
Track B: Session 2 – eDisclosure – The Next Risky Business?
- 12:00 – 1:30 **Lunch**
- 1:30 – 2:30 Track A: Session 3 – Knowledge Management - Do you Get what you Pay for?  
Track B: Session 3 – Am I Bovvered? Do I Look Bovvered?
- 2:30 – 3:00 **Break**
- 3:00 – 4:00 Track A: Session 4 – Star-Gazing vs Navel-Gazing  
Track B: Session 4 – Cooining about E-Billing
- 4:00 – 4:15 **Break**
- 4:15 – 5:00 Recap Discussion with Short ILTA Presentation
- 5:00 – 7:00 **Reception**

# PROGRAMME

## ● 9:30 - 10:30

### S E S S I O N 1

#### Track A: LITIG - Practice Management Systems

The ILTA Insight conference has been chosen for the public launch of the report on practice management systems undertaken by the Legal IT Innovators Group. This report represents the views of over 20% of the top100 Law Firms. It reflects on the relative merits and shortfalls of the systems in use to account for and manage legal practices. LITIG, a not for profit UK industry group has researched the views of many of its members, to produce this revealing report on the gap which exists between the needs of the legal industry and the provision of software by legal industry suppliers.

The session includes the presentation of key aspects of the report, together with discussion of the findings. Rosemary Kind, the report's author, together with David Bason, IS Director of Shoosmiths, Stuart Whittle, Head of Business Systems and Services, Weightmans LLP and David Hughes, Senior IT Relationship Manager, Eversheds LLP, will make up the panel.

#### Track B: Crouching Tiger, Hidden Dragon - Judicial eDisclosure Training

The Birmingham Mercantile Court has recently begun learning about ediscovery and is keen to put this knowledge to good use. For the first time in the history of the UK legal system, judges will be proactive in encouraging, or perhaps demanding, that parties before them consider all things electronic in their quest for justice. And it's not stopping at Birmingham, either. This session will give you the opportunity to hear first-hand from those in the forefront of this drive: What directions and orders can we expect to be handed down? How widespread is this initiative? What can lawyers do to prepare themselves?

## ● 11:00 - 12:00

### S E S S I O N 2

#### Track A: Digital Rights Management - Your Rights or Their Wrongs?

Is this technology going to restrict your rights to access and control your information? This session provides an overview of the growing necessity of digital rights management followed by a discussion of the effect this will have in the legal world. What happens across boundaries of organisations? Recipients should not be bound by the restrictions imposed by the sender/author of an e-mail/document – access dates, printing or forwarding restrictions must be detected and documents/emails rejected or the restrictions removed otherwise there is a real risk of DRM being abused. How would this work with the applications used by law firms and their clients (Outlook, DM, Records Management, KM, Word, etc.)? Our friends from Microsoft will be helping us to get it right.

#### Track B: eDisclosure – The Next Risky Business?

Forrester Research suggests that, by 2011, litigators will spend \$4.8 billion annually to manage e-disclosure. Competition is becoming increasingly fierce as third-party providers, including some law firms, stake a claim to their respective pieces of the e-disclosure revenue stream. At the same time, the complexity and risks associated with e-disclosure are on the rise as the rules governing it evolve rapidly in multiple jurisdictions, the technical challenges mount and certain aspects become commodities or are outsourced. Our international panel will explore emerging trends in e-disclosure and consider the risks and benefits to law firms of providing e-disclosure services directly.

## ● 1:30 - 2:30

### S E S S I O N 3

#### Track A: Knowledge Management - Do you Get what you Pay for?

Knowledge management offers a compelling opportunity to enhance the bonds between law firms and in-house counsel. Many law firms have rich know-how resources (people, processes and technology), while many in-house legal departments, operating as overheads to the business, are comparatively poor. As a result, many in-house legal departments are becoming increasingly “assertive” about accessing their law firms’ knowledge assets, be they assets they have paid the firm to develop or broader assets the law firms have developed independently. And we all know this is not restricted to firms the legal department instructs! Our panel of in-house legal department and law firm representatives will explore the needs of in-house counsel and the creative solutions progressive law firms are providing.

#### Track B: Am I Bovvered? Do I Look Bovvered?

Outsourcing and/or offshoring appear poised to remain at the top of most firms’ management agendas. Some say it’s the way of the future, others that it’s a breach of client confidentiality. We asked our panel members if they were bovvered, and we got some interesting answers. Our panel members include those who have outsourced their IT services and those who have done the same with some of their legal services. They will be sharing with you their success stories and “areas for improvement”, as well as identifying a few “gotchas” and noting future trends.

## ● 3:00 - 4:00

### S E S S I O N 4

#### Track A: Star-Gazing vs Navel-Gazing

What’s on the legal IT horizon over the next year? This informal - and potentially heated! - panel discussion will consider what’s hot and what’s not in 2008 in legal around the globe. Expect to hear terms like “DMS/RMS Convergence,” “SharePoint,” “Enterprise Search,” “Federated Content,” “Virtualisation,” “AI” and “automated coffee machines” bandied around wildly by our panelists from various sides of various ponds. Feel free to bring your own predictions, as well, as we will be seeking your involvement in this sure-to-be-lively exchange. (Did anyone notice that “e-mail management” wasn’t on the list?)

#### Track B: Cooing about E-Billing

E-Billing is never very far from any legal conference, but have you ever come across a law firm or a law department that has successfully implemented e-billing and is willing to discuss the logistics of the implementation, the pitfalls to avoid and to offer up a benefits analysis? You have now! The presentation will also include an update from the LEDES Oversight Committee. A question and answer session will follow this frank and informative presentation discussing specific UK e-billing implementation concerns.

## ● 4:15 - 5:00

Recap Discussion with Short ILTA Presentation

## ● 5:00 - 7:00

Reception

# FACULTY

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**DAVID BASON**, IS Director at Shoosmiths, is responsible for all information systems and technology. He is a senior IT professional with over 20 years in IT with an MBA from Warwick University. He has worked in two of the Big 5 consultancies and has international experience across many industry sectors including retail, FMCG and manufacturing. He is a strategic visionary with the ability to implement pragmatic solutions with a "hands on" style. David has extensive experience in managing large infrastructure and business change projects. He is an evangelist of customer service and will align IT with the business.

**GEOFFREY BEEDHAM** is the Vice President and Chief Counsel at British Telecom where he is responsible for commercial, legal and regulatory support to GSUK and Media & Broadcast. Geoffrey joined BT as legal adviser to Group Procurement Services in 1991 and since then has supported BT's non-UK interests, including the Concert alliances with MCI and AT&T, and the European JVs such as Cegetel. Geoffrey is a former Chief Counsel for the Americas; he has worked as legal adviser to an MBO from Reed International; and he was a partner in a solicitors' firm, heading up the corporate and commercial department.

**NIGEL BLACKWOOD**, IT Director, Wragge & Co LLP, has been involved with IT for many years and has been employed by Wragge & Co LLP for nearly 17 years, during which the IT department has grown from one person (him) to over 50. The firm has also tripled in size over the same period. Nigel has a passionate belief that IT does make a difference in a firm's competitiveness. The firm's successful use of technology has been recognised by a number of awards over the last five years, and Nigel was named the LOTIES Legal IT Director of the year in 2004. Nigel has served as the Vice President of ILTA's UK region for the past two years.

**HIS HONOUR JUDGE SIMON BROWN QC** has been a Specialist Mercantile Judge at the Birmingham Civil Justice Centre since September 2006. After leaving Cambridge, Judge Brown was called to the Bar in 1976, becoming Queen's Counsel in 1995. He had a wide-ranging practice as a barrister, encompassing advocacy, negotiation, advisory work, drafting, public inquiries, arbitration, lecturing and mediation. Judge Brown aims to make the Birmingham Civil Justice Centre a centre of excellence for the swift and efficient disposal of disputes, with the e-disclosure initiative being part of that ambition.

**CHRIS DALE** qualified as a solicitor in 1980 after reading History at Oxford. Since 1993, he has been a consultant working with lawyers and with suppliers on e-disclosure projects. His primary focus is on training and education aimed at raising awareness of the time and costs savings which e-disclosure brings and on the commercial and tactical advantages of being ready for litigation. Chris was previously a developer of litigation software and is an expert in conversion of data between litigation systems.

**JANET DAY**, IT Director, Berwin Leighton Paisner, has worked in legal IT virtually all her working life – even her MBA speciality was 'Competitive Advantage in the Legal Profession.' After working in administration at Allen & Overy, Janet set up a specialist consultancy practice looking at technology services for legal firms. She joined Berwin Leighton Paisner about 12 years ago – initially as a consultant but later as their IT Director with a wide range of responsibilities. In 2005, Janet won the BCS award for IT Director of the Year.

**ANDREW DEY** is Head of Operations within Legal and Compliance at Barclays Bank PLC, headquartered in London. He is responsible for many of the legal and compliance management and IT support activities. Andrew has been responsible for implementing an in-house case management system, document management, knowledge management systems and other technologies, a number of which have resulted in industry awards. He is a founder member of both the Legal IT Innovators Group ("LITIG") and the "KMIT" in-house legal group.

**SALLY GONZALEZ**, Principal and co-founder of Michael Farrell Group, has over 25 years of experience bringing IT and the business together in strategic planning and the implementation of complex, information-intensive systems that require tight integration of people, process, and technology. Sally is recognized as a leading expert in knowledge management for the legal services industry and has most recently focused on the intersection of knowledge management with compliance, risk management, records management and litigation readiness. She is a member of the Editorial Board of Law Technology News, is a frequent speaker at industry conferences, and is the author of numerous articles published in the legal trade press.

**ANDREW HASLAM** from Allvision Computing is an independent consultant who has provided specialist legal IT consulting and electronic data disclosure (EDD) strategy to some of the UK's top law firms since 1997. Andrew started his professional career serving 12 years in the British Army where he acquired an IT degree and an abiding interest in how computing can help people work more efficiently. Since early 2004, Andrew has been at the forefront of developments in EDD and is recognised as one of the UK's leading consultants in this field, speaking at many conferences and authoring a series of white papers on EDD and litigation readiness.

**DAVID HUGHES** is the Head of Business/IT Relationship Management within Eversheds LLP with responsibility for delivering Eversheds' International and Practice Management programmes of work. His fundamental objective is to ensure that the IT department's strategy and plans are fully aligned to the business strategy and that successful IT projects and services succeed in enabling that strategy. He has been an IT professional for 20 years, spending the last five years in the legal sector with Eversheds.

**DAVID JABBARI**, Solicitor, Allen & Overy, a qualified solicitor with degrees in law from Warwick and Oxford Universities, joined the International Capital Markets practice at Allen & Overy (as Global Head of Know-How) from the College of Law, where he was a member of the Board of Management and Director of the College's commercial training businesses. Prior to that, David was a Director at Bird & Bird, responsible for the management of lawyers' education and development, and jointly owned a company established by the partners of Bird & Bird to commercialise electronic learning in the legal sector.

**ROBERT JONES**, Microsoft, has been working in identity management area for over 12 years and has a strong Windows and Unix background. Robert was with IBM for five years and Sun Microsystems for five years; he joined Microsoft two years ago. He is dedicated to identity and access technologies as well as security and information protection technologies at Microsoft.

**ROSEMARY KIND**, Director of LITIG Ltd., is a writer who splits her time between technical and creative work. Her recent achievements include the "Negotiation Skills for Lawyers" report for Ark Group and "The National Conveyancing Congress Executive Summary." Rosemary was formerly both Finance and IT Director of Shoosmiths, a national law firm in the UK. She undertakes select consultancy projects for law firms.

# FACULTY

**JONATHAN MAAS** is Head of Litigation Technology at DLA Piper UK LLP and has extensive experience in litigation support and the use of technology in litigation. He started his career at Lovells as a fee earner in 1982 and moved to their IT department in 1989, where he managed the litigation support team before moving to Simmons & Simmons in 1994. In 1999, he set up his own litigation support consultancy before rejoining Simmons & Simmons in 2000 as litigation support consultant and editor of elexica, the firm's award-winning website. Jonathan is a highly regarded individual in the industry, recently recognised in the Global Tech Leaders Top 100 for his "integrity in litigation support and standards work."

**BILL MERTEZ**, Enterprise Software Architect, Winston & Strawn, has been involved in legal technology for over 17 years at the firm, with a particular emphasis in application development and process engineering. As a senior manager in the firm's IT department, he has a significant role in the firm's overall technology strategy and direction. Bill is a board member of the LEDES Oversight Committee. He has a bachelor's degree in Computer Science with a programming concentration from DePaul University.

**MARTY METZ**, Director of Information Technology, O'Melveny & Myers, is engaged in a range of projects from a refresh of firm applications to the deployment of a thin client environment at the firm. He has been involved in the legal industry since 1981. Before joining O'Melveny, Marty was the founder and President of SV Technology, the makers of LawPort, and he was the Chief Technology Officer for Brobeck, a large high technology law firm.

**BRUCE NICHOLLS** is Senior Analyst & Trainer at Bryan Cave based in the London office. He has 20 years of experience in IT service delivery with a special interest in project/programme management. He is a fully qualified Prince2 Practitioner and committee member of the British Computer Society Project Management Specialist Group. Bruce has written on project management themes for ILTA in a white paper and ILTA's quarterly magazine Peer to Peer. He is also the London Volunteer City Rep (VCR) for ILTA.

**GERARD NIEDITSCH**, Executive Director Business Integration & Technology, Mallesons, has a business background and has been working for the past 17 years in the legal industry. He has held CIO positions in two leading law firms and has also been involved in founding a leading global legal software company. In his current role, he is focused on enabling through technology the accelerating transformation of one of Austral-Asia's leading law firms.

**PETER OWEN**, Founder and Consultant, Lights-on Consulting Limited, established the company in 2005 after serving as IT Director for Eversheds for 10 years. He has experience at DuPont and the many subsidiary companies, particularly oil, gas, technology and energy conservation, where he has had roles that ranged from developer and support positions through internal consultant for start-up joint ventures to IT Manager. With over 20 years' varied experience working in the IT arena, Peter has a broad experience in all aspects of corporate IT.

**STEVE PERRY**, Head of Knowledge and Business Development Systems, Freshfields Bruckhaus Deringer, has worked in professional services for over 25 years with Ashursts, Hill Samuel, KPMG and Freshfields. He has held various business operational roles, but the key theme throughout his career has been helping organisations work out how they can share information and encourage collaboration. Joining Freshfields in 1997, Steve has responsibility for the firm's know-how and CRM systems, including the data management and support. He is also responsible for all development work on the external web site, the intranet and the extranet solutions and is leading the firmwide enterprise portal programme.

**IAN PRINCE**, Founder and Principal Consultant, princeOMC, has over 22 years' experience in the investment banking sector, the majority of that time involving IT offshoring and outsourcing. Before founding princeOMC, Ian was a director of IT at Deutsche Bank. His background gives him particular strengths in negotiating major outsourcing contracts and delivering the outsourced service, whilst his investment banking background provides significant technology management expertise in a complex, client-focused and rapidly changing business environment.

**GEORGE I. RUDOLY** is the Director of Global Practice Technology & Information Services at Shearman & Sterling LLP. George is responsible for the strategic implementation of practice-specific and information management solutions and services, including oversight of the Practice Technology Support Group and the firm's Information Center worldwide. Additionally, George is responsible for advising the firm's attorneys and clients on all aspects of applied legal technology. Previously, George held management positions in legal support at a number of AmLaw 100 law firms, including Cravath, Swaine & Moore LLP and Schulte Roth & Zabel LLP.

**JOY HEATH RUSH** is the Director of Applications at Sidley Austin LLP, a firm with more than 1,800 lawyers practicing in 16 offices worldwide. In this capacity, she is responsible for the entire desktop environment, training, and support firmwide. Currently, Joy is the President of ILTA, having previously served as Peer Group Liaison to the Board of Directors, Board Secretary, and Microsoft Special Interest Group Chair. Before becoming involved in ILTA, Joy was a five-time Board member and two-time president of the Association of Legal Information Systems Managers.

**IAN SHANDLING**, Microsoft, has 20 years' experience in the IT industry having spent the last 15 at Microsoft. At present, he is responsible for building the identity and access management (IDA) business. This includes responsibility for Microsoft's business value proposition for identity and access management products, for developing strategic partner relationships with systems integrators, solution providers and independent software vendors and for delivering revenue for the IDA product group.

**ANTHONY STABLES**, IT Manager, joined Farrer & Co in March 1996 and has been IT Manager since 2000. Anthony is responsible for all areas of IT, managing both support and development teams.

**MATTHEW WHALLEY** is KM Programme Manager for HSBC's GMO Legal Team where his role is to establish a global knowledge management function, successfully delivering KM projects while providing strategic direction to knowledge management for the global legal function. His recent achievements include launching HSBC's "Legal Smartsearch," which collates know-how from a number of HSBC's panel law firms.

**STUART WHITTLE**, Head of IT, Partner, Weightmans LLP, joined Weightmans in 1993 and qualified in 1995. He became an associate in 1998 and was made a partner in 2002. Stuart was a member of Weightmans' Professional Indemnity Department during which time he specialised in claims against solicitors and their professional indemnity insurer. In 2004, Stuart championed the roll out of bespoke case management templates to all practice areas within the firm, and in February 2005, Stuart was promoted to the Head of IT. He is a member of the Society for Computers and Law and LITIG.

**INSIGHT  
2008**

# VENUE

**HILTON LONDON TOWER BRIDGE**  
5 More London Place  
Tooley Street  
London SE1 2BY

# REGISTRATION

**THERE IS NO FEE FOR THIS EVENT, but space is limited.**  
Vendors and consultants attend by invitation only.  
Please let us know of your attendance by registering online by visiting our website: [www.iltanet.org](http://www.iltanet.org) and look for **INSIGHT 2008** listed on our **Upcoming Meetings** page, or by e-mail to Peggy Wechsler, ILTA's Program Director, at [peggy@iltanet.org](mailto:peggy@iltanet.org).

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## STATEMENT OF PURPOSE:

ILTA is the premier peer networking organisation, providing information to members to maximise the value of technology in the support of the legal profession.