

Briefing

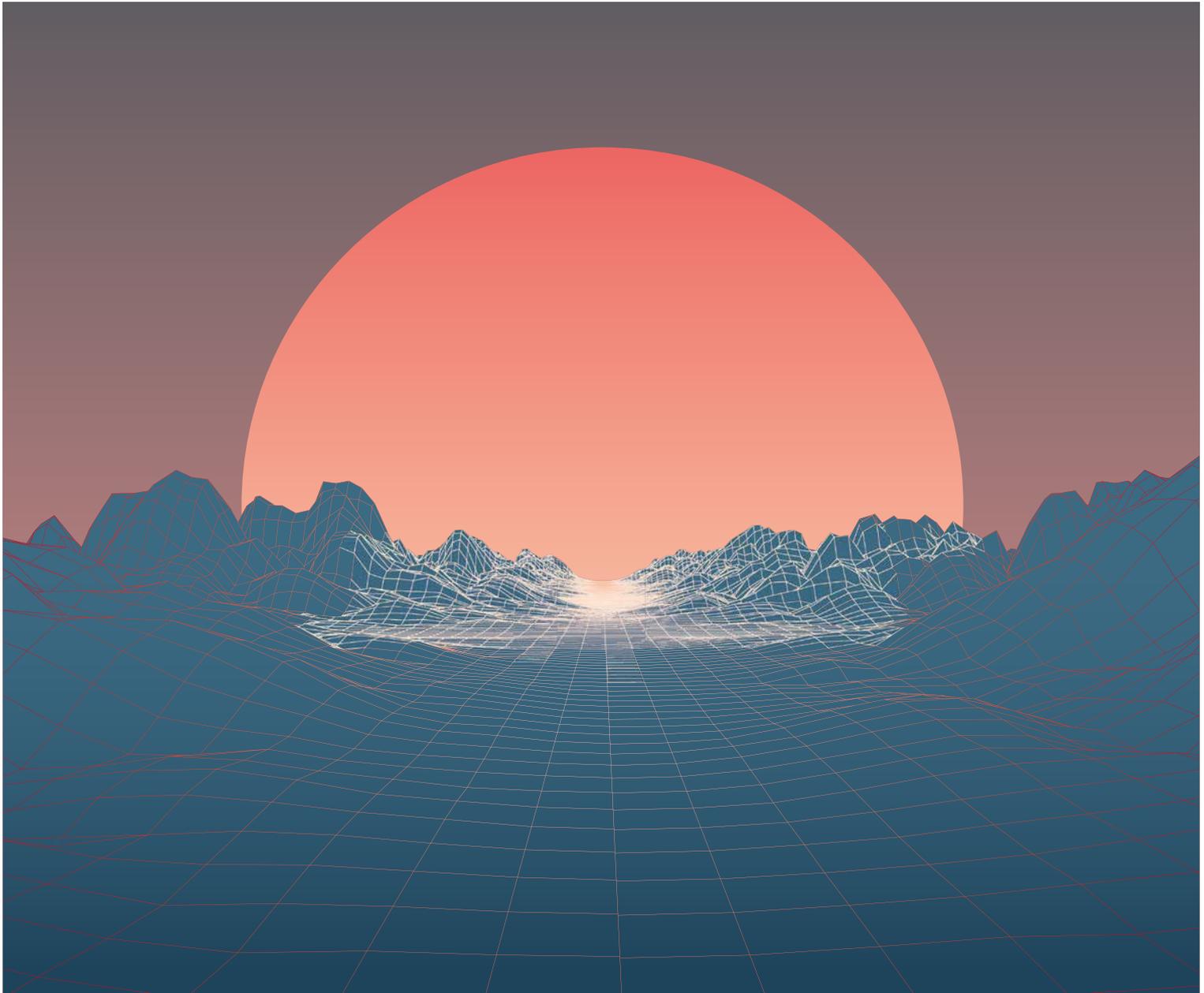
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David Cassidy, head of technology at Travers Smith, explains why, in the age of GDPR and increasing regulatory scrutiny, DocsCorp's products are a must-have

Legal tech is a space known for innovation and rapid change. But certain legal technologies have come to be critical to how legal work is done – with lawyers depending on them for essential, everyday workflows.

Having worked in technology, in varying capacities, at Travers Smith for almost 20 years, David Cassidy has seen numerous legal tech products come and go but sees DocsCorp's product suite as falling squarely under this 'essential' category. Its metadata cleaning tool, a redaction solution, along with a tool that makes image documents searchable, have all not only led to efficiency gains but have also enabled the firm to keep on top of increasingly onerous data protection requirements.

Metadata removal

It seems like every month brings us a new story about data breaches caused by hidden metadata in documents – with the General Data Protection Regulation (GDPR) raising the stakes.

It was 10 years ago that Travers Smith first noticed that more and more firms were getting in

trouble as a result of leaving hidden, confidential metadata in documents, says Cassidy. The firm itself was particularly concerned about certain types of metadata. "Things such as Track Changes and hidden rows and cells in Excel. It's so easy to leave changes in a document – we wanted software to reduce that risk," he says.

Given that hidden metadata also includes everything from author properties through to embedded objects, it can be near impossible for busy lawyers to keep track of what has been hidden.

Travers Smith turned to cleanDocs – which ensures that such potentially damaging metadata is removed from documents before they leave the firm. And it doesn't slow down the sending of emails (which could have impacted lawyer buy-in). "It automates the way that metadata cleaning happens, rather than giving lawyers a choice," says Cassidy.

Effective redaction

Redaction is, by definition, meant to hide sensitive information – such as credit card details and national insurance numbers. And increasing



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“You can edit the document in multiple places, have multiple versions, and then simply compare them to see the changes before sharing it with the client.”

*David Cassidy, head of technology,
Travers Smith*

regulatory requirements behind the need to redact means huge (again, newsworthy) risks associated with improper redaction.

Cassidy recalls that before Travers Smith started using pdfDocs (around 15 years ago), lawyers were either not doing redaction at all or were doing it incorrectly – for example, by drawing a black box over a word. This method meant that the text could be exposed simply by copying and pasting it into a new document. With the redaction feature in pdfDocs, the redaction is ‘burned’ into the document – with no way of uncovering the redacted data.

Searching images

He is particularly enthusiastic about the efficiency gains realised using the tool’s ‘find and redact’ feature. “If I have a 10-page document, for example, I can search for a word all the way through and just redact all instances,” he says. And in terms of GDPR compliance, it has proved invaluable for redacting all mentions of someone’s name. “A lot of our teams, such as employment, work on documents that mention a lot of names or departments,” he says.

If a firm is looking to realise the efficiencies of being digital-first, image-based documents failing to show up in searches is a huge oversight. Four years ago, Travers Smith found that it had lots of scanned documents on its system, but the lack of a text layer made them invisible to searches. “A lawyer couldn’t find a contract that they had done years ago,” says Cassidy.

It was to reduce such inefficiencies that Travers Smith went with contentCrawler – a tool that goes through and adds that missing text layer to pretty much any type of document. Over the course of a year, contentCrawler ‘OCR’d’ 10 million legacy documents. The benefits have been dramatic. “It exposes much more content in searches. And,

more recently, if a document goes in that isn’t text-searchable, the tool will automatically make it so,” says Cassidy.

Under GDPR, a firm must be able to find every document that relates to a client, so contentCrawler can be seen as a necessity for regulatory compliance. “It helps us identify documents more quickly. So, if someone asks for all of their documents, we just search for their name,” says Cassidy.

Document comparison

It was the need to move beyond time-consuming manual comparison that first brought Travers Smith to DocsCorp 15 years ago (the firm was actually one of its first UK customers to take on its comparison tool).

Travers Smith trialled compareDocs and was impressed with its ability to make a critical workflow both quicker and more accurate. “You can edit the document in multiple places, have multiple versions, and then simply compare them to see the changes before sharing it with the client. Also, we can quickly see what the client has added,” says Cassidy.

And by improving accuracy, compareDocs plays a key role in risk management. Cassidy remembers a time when personal assistants would decipher the comments and enter them into the document. “A clause could end up in the incorrect location in the document or have the wrong wording,” he says.

A close relationship

Cassidy is also impressed by the close relationships that DocsCorp fosters with its clients. “They are very accessible, and support is available globally,” he says. DocsCorp’s high staff retention rate also goes a long way to what he describes as a “family feel” to working with the organisation. “You talk to the same people that you did 15 years ago, although they are in different roles,” he says.

More importantly, he is also full of praise for DocsCorp’s practice of actively listening to what clients tell them that they want to do next. “When developing something they think might be useful to us, they are quick to get our views before they go to market,” he says. One issue on his mind lately is document comparison. “We are seeing so many versions of comparisons now that lawyers are struggling to compare them! DocsCorp is now doing things with document comparison to bring the changes together into one version,” he says. ▀