

# Insights and soundings

Peter Dombkins and Andrew Babbage at Gilbert + Tobin describe how they created a more powerful business intelligence proposition using the 3E Data Insights solution from Thomson Reuters, supported by Pinnacle

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**L**aw firm Gilbert + Tobin has established a reputation for innovative delivery of legal services. In 2018, for example, after a search of the legal technology market, it developed its very own tool to automate the verification process for an initial public offering (IPO) – a process that has remained largely unchanged for two decades.

More recently, the firm has been refining its data strategy and visualisation capability – in a bid to help make all manner of internal processes and practices more predictably efficient. Head of legal project management, Peter Dombkins, explains: “As law firms’ data is very unstructured, they’ve long contended with being data-rich but information-poor.” As financial data is more structured than other areas, that’s where he decided to begin.

## By the BI

A business-intelligence solution was therefore a must – and something the firm already had in place, in fact. However, having that product alone was no longer fit for purpose.

Dombkins continues: “To get the value from BI, you do rely on lawyers and those that support them using the system correctly in the first place. Our existing product was actually very good at cleaning the data, but it suffered in terms of uptake. There were only a few ‘power users’ in place, while the average partner found the quantity of information they could access quite overwhelming. We decided we needed to invest in something lighter-touch and

more precise.”

His choice was the new 3E Data Insights tool from Thomson Reuters Elite, incorporating Microsoft Power BI – something that is nevertheless now the default BI solution for Elite clients, whether on the 3E or Enterprise system. Dombkins had been exploring the potential of Power BI himself just a couple of years earlier, he says, and had already built up a proof-of-concept cube. When Elite made its move, it made sense to see whether that might meet his needs, as well as taking on the “tricky” maintenance involved.

## About the experience

Dombkins is frank that this wasn’t without risk, even coming from such an established player. Data Insights had only been launched in October 2017. “If the situation had been different, and we desperately needed a BI capability we didn’t have, the risk of choosing a new, relatively untested market offering would have been greater.”

From Gilbert + Tobin’s perspective at least, the basic product also needed some adapting to its requirements, and the Thomson Reuters team’s ‘agile’ methodology – openly welcoming client involvement – was easily able to service this.

Fortunately, the firm also had consultancy firm Pinnacle onboard to help navigate how the tool taken out of the box might be adapted. Gilbert + Tobin is one of several firms globally that took part in the early adopter programme for the solution, assessing it outside the development and test



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environment. When Pinnacle found an additional requirement, they would judge whether it was a custom one or best incorporated in the standard solution.

“One obstacle we noticed quite quickly was a lack of point-in-time reporting,” says Dombkins. His team wanted the ability to drill into the cube for what was happening “last week, or last month” to identify process improvements.

Another was the security model. “We needed something that would enable two people to see the same revenue total, for example, but still respect confidentiality in other areas.” As things stood, if two practice heads were to collaborate on leading a practice group, but had a Chinese Wall between them, they’d arrive at different numbers.

“We came up with a vision of our own alternative, which Pinnacle then built with Thomson Reuters and installed. In the best of agile traditions, much of the project has also been an iterative journey; with creases effectively ironed out along the way. We took a lot of comfort in knowing the people helping to implement were the same people that had helped to build the tool, and that proved to be a very good call.”

Practice manager Andrew Babbage adds: “Pinnacle has been really instrumental in communicating our requirements to Thomson Reuters to reach the viable solution we now have. For our part, we’ve also appreciated having the opportunity to provide input that was fed back to them.” At the time of speaking, Dombkins and his

team were just days away from rollout.

### Future focus

The firm expects several advantages – even cleaner data, more flexible reporting that should also help with uptake, as well as a greater breadth of visualisation options, such as colours and design styles in dashboards. Babbage explains: “Groups of users do have fairly bespoke needs, so you need something flexible enough to spin out information quickly, often for a relatively short duration.”

“Plus, it plays nicely in the sandbox with other tools, such as Microsoft Teams – it should all be that much more usable at significantly shorter notice,” adds Dombkins.

Babbage continues: “Over time, the hope is we also manage to line data sources up efficiently across all systems, whether that’s the email or even the phone system. And there’s a reasonable and growing pool of talent in the market that possesses Power BI skills in particular.”

But a final word of warning from the pair – this is no “turnkey” solution if you want more than “stock cubes” out of it. Other interested firms should ensure they’re resourced for all of the groundwork. Babbage says: “It’s a project that forces you to think hard about the detail behind how data is structured now and how you want to use it in future.”

“Visualisation is the cherry on the BI cake,” says Dombkins. “The really hard work is transforming the data into the mixture you need.”