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Microsoft has a plan - of sorts - for legal DMS

Last month's story about SharePoint as a legal market DMS certainly put the cat among the Monty Python parrots. But, as a number of Microsoft SharePoint partners were quick to point out, Microsoft does have a plan for document management and it is being pioneered by its own internal Legal & Corporate Affairs department. With 1100+ staff in 55 countries, the LCA is the equivalent of a large law firm in its own right.

Microsoft will be talking further about its legal DMS plans at ILTA later this month however it has already unveiled some of the details at its recent global partner conference, in its new price plans for Office licensing (which come into effect on 1st October), and at an ILTA SharePoint symposium in June. (The Insider was scheduled to get its own briefing but unfortunately one of the key executives – Holly Hanna – who presented at the ILTA symposium failed to survive the recent job cuts at Microsoft.) Follow the link to the ILTA slide-deck http://cloudbox.legaltechnology.com/LCA.pdf

What is immediately apparent about the Microsoft LCA DMS initiative, with its focus on Sharepoint Online, Yammer, Azure, OneDrive and Office 365, is it's a cloud rather than inhouse installed project.

Yes, it is disruptive, in that we can see it appealing to smaller firms that currently baulk at the cost of a traditional DMS. We can also see it appealing to firms moving from a CAPEX to an OPEX approach to IT procurement. However we suspect Old School legal IT departments will struggle to get their heads around the concept.

Bye-bye Burrill in Linetime MBO

Leeds-based legal software suppliers Linetime Limited has completed a management buyout for an undisclosed sum. The 50% stake held by founder and former chairman John Burrill has been purchased by managing director Tony Klejnow and development director Phil Snee.

Speaking about the buyout Tony Klejnow said "Over the past 30 years (the company was founded in 1983) the Linetime team has built up an excellent reputation among the legal profession for developing software that makes practices more efficient, helps improve the services provided to clients and improves productivity. We are delighted to have completed the buyout of John's stake and we are looking forward to maintaining that success by continuing to develop software that will keep us at the forefront of technology."

COMMENT: Although most of today's legal IT software seems to come from the USA, back in the late 1970s and early 1980s, Leeds and the surrounding area of Yorkshire was the UK's legal technology hotspot (not so much Silicon Valley as the Parkin Valley) with not just Linetime but also Solicitec, Technology for Business, LawData, Eclipse, Videss and AIM all operating there.

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Not the Curse of the Black Pearl !

In the last issue we posed the question: who would step in to claim the BPM/workflow systems crown in large law firms now that the OpenText Metastorm eWork platform was heading into the twilight zone? Along with offerings from Elite and LexisNexis, a popular suggestion was Intapp Open however now another vendor has been tossed into the ring, namely K2 with its range of applications, including the intriguingly monikered Black Pearl system.

Current K2 legal sites include Baker & McKenzie, Heller Ehrman, Kilpatrick Stockton, the English Legal Aid Board, Winston & Strawn, TLT, Schulte Roth & Zabel, Keoghs and Bracewell & Giuliani. In the UK the most recent deal was with Ince & Co, who selected K2 from reseller partner Sword Group as part of their ongoing business improvement initiative. Sword and K2 are also working with several other UK law firms. **www.k2.com** + **www.sword-ecm.com**

Data collection in court

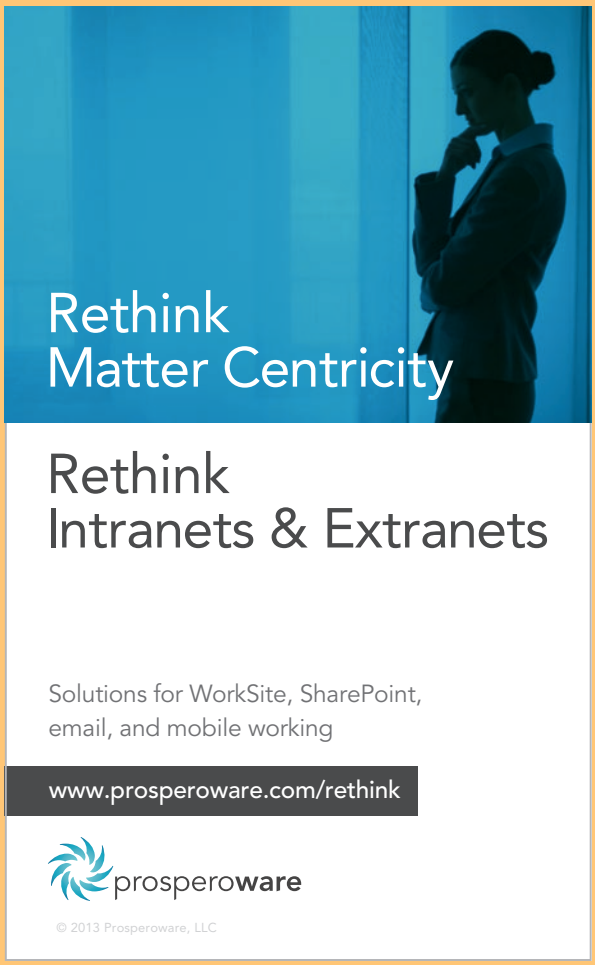
The UK systems house Toplevel Computing, which specialises in secure digital service solutions for UK government departments and agencies, has just launched a Mobile Data Collection module for its Outreach case management engine.

The new module enables structured, guided data collection over any mobile device, so sensitive data can be entered at any location. In environments where connectivity is poor or non-existent (such as many older court buildings) Mobile Data Collection offers always-on functionality, sending data securely upon reconnection to a 3G, 4G or WiFi network.

The Outreach Mobile Data Collection can be used to complete a variety of formal documents such as application forms, reports, audits and assessments. The module is currently being piloted by the Legal Aid Agency, an executive agency of the Ministry of Justice, who are collecting criminal legal aid applications from solicitors.

Data is collected at court, then sent to the Outreach platform for processing. Solicitors are then able to monitor and track the progress of the application via the Legal Aid portal.

The new module is platform agnostic, supporting any mobile O/S, so data can be collected, recorded and transmitted over laptops, smartphones, tablets and BYOD devices. Data in transit is protected using up to 256-bit AES encryption. **www.toplev.com**



Who's in & who's out: the latest wins, deals & rollouts

UK WINS With so much interest in document management at the moment, we start with two out-of-left-field DMS stories. The first is that **Copyrite**, which recently became a reseller for the **Worldox** DMS, has won its first site in the UK at Top 200 firm **Paris Smith**. Copyrite say they have two further deals on the way. **www.copyrite.co.uk**

The second story is the news that **Coles Solicitors** is a beta site for a brand new cloud-based document and email management system for smaller firms, with full Microsoft Word and Outlook integration, from **Quill Pinpoint**.

Walker Morris in Leeds becomes the fifth large firm in recent months to select **Rekoop** as its desktop and mobile time recording platform.

Staying with **Walker Morris**, the firm has also signed a deal with **Tikit** and **BT** to support its IP telephony, WAN, LAN and internet connectivity. Other new Tikit/BT comms/infrastructure deals include **WP Thompson** (Mitel) and **King & Wood Mallesons** (Cisco LAN). Finally, **Dickson Minto** is rolling out Tikit TMS v.6 for template management.

Elite systems specialist **Opes Consulting** has won its largest ever contract – a £0.8 million deal with **Clyde & Co** to help the firm transition from **Thomson Reuters Elite**'s legacy Enterprise software to the new 3E platform. The Opes team, led by co-founder Kevin Smith, is working on an insourced basis, heading up project management, installation, development and training and expect to complete the rollout across 35 offices in five continents by Autumn 2015.

COMMENT: Insider records show Clyde & Co was the first UK law firm to order Elite back in 1994 and *yes* we did say £800,000.

North Yorkshire firm **Raworths** is replacing its Solcase case management software in favour of its successor product **Lexis Visualfiles** 2014.

EEF, the employers' organisation for UK manufacturers, has selected **Elite MatterSphere** to help streamline its legal workflow, document management and contact management across both legal and non-legal departments.

In two managed services deals: **Ashton KCJ** has awarded **Quiss Technology** a deal worth £1.2 million over five years to support 300 users across seven locations; and startup **Carbon Law Partners** has awarded **e-know.net** a co-sourcing contract to deliver its managed desktop solution along with its new **LexisOne** PMS.

Ochresoft has won its largest order to-date for its cloud-based Intelliworks conveyancing software from 40-user Cornish law firm **Coodes**.

Foot Anstey is the latest law firm to rollout **TheWealthWorks Troika** probate/private client system. Other law firm sites include **Macfarlanes**, **Penningtons** and **Wrigleys Solicitors**.

WINS & DEALS CONTINUED ON PAGE 5

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NORTH AMERICAN WINS West Virginia law firm **Bowles Rice LLP** has selected **Aderant Expert** as its new financial and practice management platform. Among the additional Aderant software modules the firm will be implementing are Found Time time recording and paperless billing.

Recent **DocsCorp** wins include **Wolf Greenfield & Sacks**, **Glancy Binkow**, **Kooperman Gillespie Mentel** and **McCracken & McCracken** on pdfDocs and **Wendel Rosen Black & Dean** and Canada's **Gahtan Law Office** on compareDocs.

EMEA WINS The Dutch law firm **NautaDutilh** has signed up to roll out **Tikit Carpe Diem Mobile**, running on phones and tablets, to its fee earners. The firm already uses Carpe Diem on the desktop.

Another Dutch law firm – **Pels Rijcken & Droogleever Fortuijn** – is replacing its OpenText DMS with SharePoint-based **Epona DMSforLegal** software.

CMS Hasche Sigle, the German arm of the CMS law firm network, is now using **ABBYY PDF Transformer**+ to archive searchable PDF documents within Microsoft SharePoint. PDF Transformer+ can also be used to convert PDFs into editable documents.

Also in Germany, **DocsCorp** has won two more sites: **Pohlmann & Company**, who have purchased compareDocs and pdfDocs plus **Heuking Kuhn Luer Wojtek**, who have bought compareDocs and cleanDocs.

Offshore legal and fiduciary services firm **Bedell** has deployed Phoenix Office Center from **Phoenix Business Solutions** to centralise template management with Microsoft Office.

APAC WINS Australian law firm **McCullogh Robertson** has rolled out **Intapp Wall Builder** to provide internal information security, protect client confidentiality and comply with new regulations, such as the revised *Australia Privacy Principles*.

Piper Alderman in Adelaide has added OCR Desktop to its **DocsCorp** pdfDocs licenses, while the **Attorney General's Department** in Canberra has gone with pdfDocs.

WINS & DEALS CONTINUED ON PAGE 7

Ten Years After...

The big stories in the summer of 2004 included the completion of the sale of Solution 6's legal software business to Francisco Partners – the business would subsequently rebrand as Aderant and in 2008 it would be acquired by Vista Equity; Solicitec changing its name to Visualfiles Legal Solutions – this business is now part of LexisNexis; Mountain Software (now part of Advanced Legal) announcing it was to launch an all-new .NET product – this would later evolve into the ALB system; and Axxia Systems (now also part of LexisNexis) announcing its new .NET strategy, which would later become part of its DNA system.

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Seize Better Time Entry Today

With firms standardising on new mobile platforms (or opting for "Choose Your Own Device" policies), and lawyers increasingly using phones and tablets, mobile time entry is now a "must have."

Yet some firms are still using cumbersome mobile software that make basic time entry tasks like assigning client / matter numbers an onerous chore.

With a twenty-plus year history delivering time entry software, serving 500 firms, Intapp offers the most sophisticated time management software available, uniting the industry's best automated capture, desktop entry and mobile time recording applications.

Available as an integrated suite or as individual components, Intapp Time offers unique features designed to delight lawyers, finance and firm management.

For example, only Intapp enables lawyers to validate entries against e-billing guidelines and other compliance rules as they enter time (or when they release it), so they can fix errors instantly.

And only Intapp Time provides real-time desktop-to-mobile timer synchronisation — for easy tracking and entry, anywhere.

Enabling easy lawyer adoption and access, Intapp offers native time entry on all major mobile platforms, and key capabilities like offline mode with full client matter data storage and validation.

Intapp Time has been adopted by 63% of the Global 200(1) and 71% of firms with 150 or more lawyers(2). And with incentives in place for firms looking for a more modern solution, there's never been a better day to seize better time management software.

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Software for a Changing Legal Market

1 — Source: The Legal IT Insider ("The Orange Rag") 2 — Source: International Legal Technology Association (ILTA)

WINS & DEALS CONTINUED FROM PAGE 5

Advanced Legal reports that 17 firms have signed up for its ALB case and practice management system over the past three months, including **Millar McCall Wylie** in Belfast, which is an AlphaLaw migration, plus **Parker Rhodes Hickmotts** and **Graham & Rosen**, which are both Videss Legal Office migrations. The latter two firms are also switching from Oyez to **Laserform**. Hull-based **Graham & Rosen** is also swapping out its legacy G2 digital dictation in favor of **BigHand.** The project will include integration with ALB and implementing speech recognition for some users.

Following 18 months of the New Homes department of **Pitmans LLP** using **Safe4** (*see issue 274: Fresh on the Radar*) to ensure the secure, ISO 27001 compliant, online delivery of property related documents, the firm is now rolling out the Safe4 system to other departments.

Bindmans LLP has chosen **Phoenix Business Solutions** for its firmwide HP WorkSite deployment, while both **Speechly Bircham** and **Reed Smith** are to implement Phoenix MatterView and **KPMG** has selected Phoenix Monitor to help manage its WorkSite environment.

InterAction killers a non-event?

Over the last couple of weeks both Aderant and Elite announced new initiatives with their respective CRM systems: Aderant unveiled CRM4Legal v5.3 with enhanced Aderant Expert and Microsoft Exchange integration, while Thomson Reuters Elite formally launched its own Business Development Premier CRM system.

Meanwhile the international law firm Dentons announced it was consolidating globally on LexisNexis InterAction for its CRM platform. All of which prompts the question: are the wannabe InterAction killers offering too little, too late?

InterAction now has 500+ sites worldwide and is the market leader among both the Global and UK top 100 law firms. Furthermore, in the UK, APAC and European regions, it is winning an average of 15 new customers a year, including a number of competitor swapouts but with nobody stealing any of its market share in return.

As sales director Guy Phillips comments "InterAction goes from strength to strength with a product roadmap that will see enhanced functionality in business development and analytics. Our year on year growth is largely due to the breadth of the product's functionality aimed specifically at professional services firms, the extensive inhouse expertise around implementing and supporting CRM, and integration with tools such as Vuture, Concep and Tikit eMarketing."

In other words, InterAction offers an ecosystem other products cannot challenge and, with law firm marketing having grown increasingly sophisticated in the nearly 20 years since InterAction first appeared on the scene, it is the existence of these integration tools that continue to give it the edge.

Tikit enters phone market

At the time of the BT acquisition of Tikit, some people were joking that Tikit would soon be selling telephones. Guess what, they now are!

BT recently launched a fixed-to-mobile convergence product called BT One Phone. This is a cloud-based phone system that acts like a desk phone in the office and a mobile phone when you are on the road. Using this solution, law firms will be able to reduce costs by swapping out their desk phone and replacing them with smartphones for fees earners and staff.

BT One Phone is now available through Tikit, with Tikit CEO Tim Springham commenting "We will initially target firms that have between 20 and 250 staff, and can potentially cut their fixed voice costs by up to 20%". He added that this was the first in a series of new product launches over the coming months, as BT re-enters the mobile market after having acquired a mobile spectrum during last year's 4G auction.

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TOP 10 INCOME RECEIVED
Matter ID
Client Sort
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1200
800
400
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Hours
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Oct
Nov
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Has Kia's tech skills initiative been hijacked & pointed in the wrong direction?

Last month we reported that Carillion had become the latest organisation requiring law firms to work with its matter management systems, raising the prospect of UK businesses following the example of Kia Motors in the US which, via general counsel Casey Flaherty's initiative, has introduced a 'base technology competency audit' for lawyers as part of its external counsel selection process. But, is this initiative now in danger of being hijacked and pointed in the wrong direction?

Now there is nothing wrong and everything right about the underlying concept that law firms should not be rewarded (or at least expect their clients to pick up the tab) for their own inefficiency. If a lawyer is so IT incompetent that it takes them four hours to complete a task that should only take one hour, then of course it is outrageous that they then bill four times more than the job is worth. And *yes* of course the lawyers in question need remedial training or else should not allowed to inflict their ignorance on the firm's clients. But, this is only part of the story.

What we are now seeing is every legal IT training company on the planet jumping onto the we-can-teach-your-lawyers-technology-competency bandwagon but nobody addressing the more fundamental underlying issue of usability. To put it another way: is the reason lawyers struggle to use legal software because they are inherently stupid – or because the legal software they work with has inherently stupid user interfaces?

Question: which software application is the most widely used by lawyers in the world today?

Answer: Facebook though admittedly this is almost exclusively used in a private, non-work capacity. But do we see lawyers (or anyone else for that matter) going on three-day training courses to learn how to use Facebook? Of course not and nor does the world come to an end when Facebook makes yet another change to its user interface. We just shrug our shoulders, say "Yeah, whatever," and get on with posting pictures of cats looking cute.

Why? Because Facebook plus dozens of other applications and thousands of apps available for tablets and smartphones are the product of the social media age and the consumerization of software. Unlike Ye Olde Legal Systems with their captive audiences who have to use them at work, with consumerization, users gain freedom of choice. If they don't like what they see in one app, they swap it out for another. And if developers can't deliver what the users want, especially ease of use, then this month's Facebook can easily become next month's MySpace. Left to fend for themselves, many legal business applications and their clunky user interfaces would have been rejected as unfit for purpose long ago.

Of course training is important but good, modern software should only require minimal training because it should also possess an intuitive interface. It's the software stupid: training is a sticking-plaster but to heal that wound, law firms and their IT departments need to start chivvying their IT vendors to provide better interfaces.

We've already seen it sweep through the <Search> world: complex Boolean search techniques are dinosaurs. Today search must be as simple and intuitive as Google if there is to be any hope of anyone using it. Next in line for an extinction event is business software if it fails to grasp the challenges of social media and consumerisation.

Charles Christian, editor
@ChristianUncut

Editor's Pick provides, at a glance, an overview of the month's key news stories published on the Legal IT Insider website, complete with links to any stories you may have missed.

Here's what one large US legal publisher said about the first issue "Easy to like round-ups we know have been vetted by an industry veteran." Our next issue is out Tuesday 19 August.

New Business Intake is Too...

Slow ■ Frustrating ■ Inflexible ■ Time Consuming ■ Hard to Change
Complicated ■ Dependent on Data Entry ■ Painful on Mobile Devices

(We Can Fix That)

Efficiently taking on matters is critical to the practice of law. Today, several market trends are putting new pressures on law firms to transform the way they evaluate and engage new business:

- Clients expect greater service (and want to pay less for it)
- Lawyers want to start work immediately (sometimes before conflicts are cleared or matter numbers are issued)
- Firms want to more carefully evaluate the clients and matters they accept (to avoid surprises or unpaid bills)
- IT and Risk Teams are eager to provide lawyers with easier tools, faster service and a pain-free experience

Thriving in this environment requires an innovative approach to intake and conflicts — one that allows firms to act quickly (while still rigorously evaluating new matters), to delight lawyers (especially on mobile devices) and to easily change processes over time (without outrageous delays or expense). In short, intake must evolve.

Intapp Open is the answer. Instead of offering complicated tools that require expensive, time consuming implementation projects (and ongoing consulting bills), Intapp offers a fresh approach, designed from the ground up to address the diverse and specific needs of firm management, lawyers, risk staff and IT stakeholders.

In the past year, over 30 firms (with as few as 70 and as many as 4200 lawyers) have chosen to adopt the product.

Whether as part of a strategic push to improve client analysis and firm profitability, a program to reduce risk, or an initiative to speed matter opening times and improve lawyer productivity (and satisfaction), Intapp Open has something to offer every firm.

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Software for a Changing Legal Market

Fresh on the Radar

Two interesting products to look at and both fall into the broad category of social media. The first is **ClickDimensions**, a marketing automation tool for users of Microsoft CRM Dynamics.

Click provides access to a range of facilities including email marketing, web tracking, lead scoring, 'nurture marketing' (= building up and monitoring relationships with prospects), SMS/text messaging, campaign tracking, forms capture, surveys, landing pages, social discovery and event management. In fact everything you need to turn Dynamics CRM into a marketing ecosystem.

The social discovery element is of particular interest as it will bring back data and direct links to the prospects' or contacts' identities from a variety of social networks including LinkedIn, Facebook, Twitter and YouTube.

ClickDimensions, which is US based but also has an EMEA office in the Netherlands, has videos and a range of free downloadable ebooks on marketing with Microsoft CRM Dynamics on its website.
www.clickdimensions.com

Next up we have **Jostle**, a cloud-based intranet platform that basically allows you to do everything you'd normally do on Facebook, LinkedIn and Twitter but in a business context from behind your own firewall.

In effect this an out-of-the-box social media platform for people who don't want the expense of a proprietary system and are unhappy about the direction Microsoft Yammer is taking, now that it is being bundled with Office 365. (In fact David Sacks, the co-founder of Yammer and head of Microsoft's Yammer division, recently quit the company.)

In what is the first UK law firm implementation, East Anglia-based Top 200 firm Ashton KCJ has begun a Jostle pilot for an intranet that will eventually include News, People, Activity, Library and Discussion sections, as well as links to external sites. The Justle website contains links to overview videos and webinars.
www.jostle.me

Peppermint bullish at year end

Peppermint Technology just issued a statement on its financial performance for the year ending 30th June – and bullish it is too, with the company showing over 200% growth on last year and over £10 million in forward contracted revenue. In the last 12 months Peppermint has added a number of new customers taking its total client base to over 20 firms and 3000 users. New customers include Taylor & Emmet, Mayo Wynne Baxter, Gepp & Sons, DezRezLegal, Gosschalks, Hine Legal, Thor Lion, B P Collins and Ashton KCJ. In addition, the recently merged Blake Morgan is midway through its implementation.

Peppermint will also be launching a new product line for smaller firms under the brand of PeppDirect. This will provide firms, with little or no IT staff, with an out-of-the-box version of the Peppermint Platform complete with templates, workflows and dashboards. Three firms have already signed up for PeppDirect.

Founder and CEO Arlene Adams said "Peppermint has the right product, in the right market, at the right time. Legal firms are facing multiple challenges from new entrants, margin pressure, legislative reforms and a shift in customer buying patterns. There is a growing realisation that customer and data centric technology, based on a Microsoft standard platform, is the cornerstone to addressing these challenges. Legal firms are in the content business and need to think, behave and operate more like a digital business from the front office to the back office. We help them do this."

COMMENT: Peppermint's 2014 results are in sharp contrast to the previous year's accounts which revealed a £1.3 million loss. But, as Adams points out, that period included huge investments in resources and headcount "Peppermint's financial position is reflective of an early stage, fast growing software company. We aren't building a small niche legal software company… we are on the road to build a big software house so we can't be compared to the Old School legal IT vendors. Times have changed and this market needs big investment – and that will drive a good return for customers, employees and investors alike."

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