

legal*i* insider

Legal IT's leading news resource

Top stories in this issue...

- Microsoft having a good month making progress with its SharePoint + DMS + Office 365 offering see *page 2*
- Another bad month for the English Law Society and its legal IT initiatives see *below*

99% of law firms say the Law Society has IT all wrong!

As the Law Society of England & Wales continues to flounder around looking for a way to justify its existence in the *Legal Services Act* era, the UK's Legal Software Suppliers Association (LSSA) has published the results of a survey it conducted, asking law firms for their views on the Law Society's proposals to appoint a 'preferred legal software supplier.'

The results were almost unanimous with 99% of respondents saying they were opposed to the Society's proposal to have one or a very small number of preferred suppliers of case and practice management software to the legal profession.

Participants in the survey were also invited to add their own comments on the proposals. Once again these were less-than complimentary: "A one size fits all solution is thoroughly misguided..." "Having one preferred supplier is ridiculous, how can one supplier meet all needs and budgets..." "...the selection should be based on what is best for the profession, not best for providing the Law Society with a cash cow..." "The legal profession has lost all faith in the Law Society..." **Continued on page 9**

Hey 19 - crossing the digital divide

This month **Legal IT Insider** celebrates its 19th birthday. Yes, it was in October 1995 that we first launched our orangeness upon the legal technology world! As one of the UK's leading legal IT consultants recently commented, since then we've had "plenty of imitators but no competitors."

Normally on anniversaries we look back to see what people were talking about in Ye Olden Days: *Oh look, in late 1995 law firms were having difficulty locating WordPerfect for Unix licences!* (No, that really was a big issue.) However this year we are looking forward to what the Insider will be offering in the months to come.

New Events: After putting the 'wow' back into legal IT events with **LawTech Futures** over the past three years, the Insider is now working with a new events management company to develop two new events to educate and entertain you.

Silver Screen: Next week we start shooting a pilot series of web TV videos **Talking Tech with Charles Christian** in which we question legal IT innovators on the law firm, inhouse legal and vendor sides on key issues. We are excited about the particular video platform being used as it offers DVD-like interactive functionality.

Legal Industry Video Awards: Following a huge number of entries, judging has now begun and the results will be announced shortly.

On the Up: Our latest app – the best yet and free – shows a steady rise in downloads mirroring market trends and new subscribers to the monthly newsletter continue to increase month after month.



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IT jobs market now booming like its 2006

As a service to readers, the Insider has always carried legal IT job vacancies (both from law firms and vendors) on its website and it's been apparent that since this summer, we've been running more new vacancies than at anytime since the heady days before the economic downturn hit in the autumn of 2007.

Mark Lennard, the managing director of leading UK legal tech recruitment consultancy Lewis Paige says we are seeing a virtuous spiral of job vacancies. Law firms are recruiting heavily to replace staff shed during the recession because they are now expanding again and need to replace and upgrade their increasingly dated technology platforms. And legal IT vendors are recruiting because they need extra staff to meet the increased demand for their services from law firms.

Microsoft scopes out its SharePoint legal initiative

Earlier this month we spoke to Nishan DeSilva, who is responsible for Business & Technology Solutions within Microsoft's Legal & Corporate Affairs division and, as such, is the public face of Microsoft's new Legal Matter Center initiative.

He explained how the LCA (Microsoft's global, 1100 user inhouse legal department) regularly meets with external law firms to discuss collaboration and one of the issues identified was the firms' discontent with their existing document management systems. One complaint was that "traditional" DMS solutions such as OpenText and HP WorkSite are not readily available on the cloud (although it looks like HP is now addressing this).

While a second concern was that all the initiatives on SharePoint-based legal DMS solutions stemmed from quote/unquote "here today, gone tomorrow" third-party suppliers rather than Microsoft itself.

Taking these concerns onboard and confident that SharePoint 2013 (Nishan believes many of the reservations people have about SharePoint are based on their experiences with earlier versions) is a viable platform for a DMS, earlier this summer the LCA launched its Matter Center initiative and was pleasantly surprised to get a response six-times greater than anticipated.

So what happens next? Phase one is implementing Matter Center internally within the LCA, starting in Redmond before rolling it out globally to 55 countries. This is scheduled for the summer of 2015.

Continued on page 9



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3 – UK WINS & DEALS



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

UK WINS In one of the biggest rollouts of the month, **Eversheds LLP** has completed the implementation of its new **Intapp Open** system for managing conflicts searches and speeding up the new business acceptance process. Since going live, Eversheds now process an average of 160 conflicts searches a day.

Keeping up its "Hey Intapp and Tikit, you ain't the only time recording game in town," sales drive, **Rekoop** has signed up **Morton Fraser** and **Burness Paull**, two of the largest law firms in Scotland, who are now rolling out Rekoop on the desktop and on mobile devices.

As part of a major infrastructure upgrade following its recent merger with **Myer Wolff, Pepperells Solicitors** on Humberside has rolled out the **Select Legal Systems LAWFUSION** case and practice management system across the newly expanded firm and selected **BigHand** digital dictation software. Pepperells will also be using BigHand's mobility apps for smartphones and tablets, as well as rolling out speech recognition to a small number of users, with a view to expanding this at a later date.

Staying with the two companies: Cardiff lawyers **Martyn Prowel** are now using BigHand speech recognition to produce witness statements, so they can now generate transcribed documents for witnesses to proof and sign within minutes of taking the statement. And, Select Legal reports that September was a record month for sales, with seven firms placing orders for LAWFUSION, including an 80-user firm with 11 offices in the South-West.

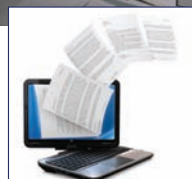
Advanced Legal has enjoyed a good quarter with a total of 27 firms signing up for the **ALB** case and practice management system. The new wins include **Scott Duff & Co** in Cumbria, property specialists **Unsworth Rose** in Primrose Hill, Bristol-based **Cooke Painter** and the 20 office legal and accountancy firm **HCB Group**, which

was formed through a series of mergers, including **Widdows Mason** and **Park Woodfine**.

HCB, along with Cheshire law firm **Cullimore Dutton**, is also implementing the **OverVu** (developed by Exen Legal Solutions) business metrics dashboard and KPI reporting suite. Finally, **Senate House Chambers**, a new barristers set in Northampton, has gone live with a hosted version of Advanced's MLC chambers management system.

The **York City Council legal services** team has gone live with a bespoke **Norwel Prescient+** case management system, following the migration of 10,000 matter records and 10 years' of time recording data, stored on five disparate legacy applications, onto the new integrated platform.

WINS & DEALS CONTINUED ON PAGE 5



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LatAm to go SAP?

Although the progress of SAP seems to have stalled in Europe, there remains strong interest in South America. As Colombian law firms face increased competition from a slew of international entrants, local independent magic circle firm **Posse Herrera Ruiz** is undertaking a complete overhaul of its IT systems including looking at **SAP** or "equivalent" enterprise resource planning (ERP) platform. The firm is working alongside **Janders Dean** founder Justin North in selecting an ERP provider, with a decision expected shortly. The integrated system will be rolled out next year to coincide with the circa 100-lawyer firm's adoption of new international accounting standards.

• **Baker & McKenzie** is scheduled to start its global SAP rollout in December.

US WINS SharePoint specialist **Handshake Software** reports that five US top-100 firms have selected Handshake portal and enterprise search products over the past two months. The firms include **Baker Botts**, **Cadwalader Wickersham & Taft** and **Finnegan Henderson Farabow Garret & Dunner**. Handshake CEO **Doug Horton** says firms are keen to take advantage of the new features, including search, within SharePoint 2013.

Jackson Kelly has selected cloud-based **NetDocuments** to replace its legacy **Worldox** on-premise document management system. The firm's CIO and long-time ILTA board member **Skip Lohmeyer** said that along with cloud security and client collaboration, NetDocuments means "we are able to access pertinent firm information from any device, anywhere in the world."

Another strong month for **DocsCorp**, which does now seem to have carved itself a niche as the market leader for document production and productivity tools. **Woods Oviatt Gilman** in Rochester (NY), **Cohen & Grigsby**, **Montgomery McCracken Walker & Rhoads** and **Hershner Hunter** have purchased the compareDocs redliner. Other firms buying DocsCorp products include **Bowles Rice**, **Lennox Paton** in Nassau, **Wallace** in

Chicago, **Hall Render** in Indianapolis and **Strong Pipkin Bissell & Ledyard** in Houston.

Smart Time Apps, the provider of the Smart Time family of timekeeping applications says **Bilzin Sumberg Baena Price & Axelrod** in Miami has deployed Smart Time Mobile. And **Matt Reynolds** says following the recent rollout of Smart Time at his firm **Meyers Nave**, "we already can see a positive effect on the bottom line."

Weintraub Tobin in Sacramento has licensed the **kCura Relativity** web-based platform for ediscovery processing, review, analytics and production functionality. Michigan-based lawyers **Plunkett Cooney** has also licensed Relativity for inhouse use via **Iris Data Services**.

WINS & DEALS CONTINUE ON PAGES 7 & 11

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Business Intake

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Efficiently taking on matters is critical to the practice of law. Today, several 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), delight lawyers (especially on mobile devices) and 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, built specifically to address the diverse needs of firm management, lawyers, risk staff and IT stakeholders.

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7 – EMEA + APAC WINS & DEALS



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WINS & DEALS CONTINUED FROM PAGE 5

EMEA WINS The Dutch law firm **Banning**, which already runs the SharePoint-based document management system **DMSforLegal** from the Dutch legal IT supplier **Epona Legal**, is now to work with Epona on a pilot of the new Microsoft Matter Center plus Office 365 solution for the legal market.

Epona is also working with with Vienna-based **CMS Reich-Rohrwig-Hainz** (CMS-RRH, part of the CMS law firm network) on a rollout of a SharePoint-based DMS across offices in seven central and eastern European countries, starting with the first production site in Bulgaria before moving on to Austria.

Swedish law firm **Gernandt & Danielsson** (G&D) has rolled out **Sysero** as part of its inhouse knowledge management platform. Called SMART, G&D's KMS comprises a SharePoint library, classification and workflow system, integrated with the firm's DMS that can be accessed within Microsoft Word.

Kammeradvokaten in Denmark and **Taylor Wessing** in Germany have selected pdfDocs from **DocsCorp** while **Kluge** in Oslo has expanded its suite of DocsCorp applications to include cleanDocs and compareDocs.

King & Wood Mallesons SJ Berwin (although the SJ Berwin bit gets consigned to history in a few days time) has rolled out **HotDocs** automated document generation software to 1150 members across offices in Europe and the Middle East, including Dubai and Riyadh.

Norton Rose Fulbright has selected **Phoenix Business Solutions** to deploy **HP WorkSite** at its Moscow, Almaty and Middle Eastern offices. This is the latest phase in the Norton Rose consolidation onto WorkSite, following Norton Rose Canada signing with Phoenix earlier to migrate 1800 users from OpenText to WorkSite.

In other Phoenix WorkSite deals, the **Abu Dhabi Media Zone Authority** has selected WorkSite for document and email management, while **Elden** in Norway has selected Phoenix to handle its WorkSite implementation. Elden has also purchased Phoenix MatterView and Workspace Assist to provide integration with the

firm's **DelteK Maconomy** ERP to deliver matter summary dashboards with integrated financials.

And, offshore law firm **Appleby** has selected Phoenix Guardian to provide an increased security, compliance and data leakage prevention capability.

Finally, and almost at the opposite end of the EMEA region, Nigeria's leading commercial law firm **Aluko & Oyebo** is to roll out **Rekoop** time recording software, both for the desktop and mobile, to fee earners in three offices. The firm will be integrating Rekoop with its LexisNexis PCLaw accounts system.

APAC WINS **Cooper Grace Ward**, one of Brisbane's largest independent law firms, has chosen cloud-based **NetDocuments** to replace its existing on-premise **HP WorkSite** DMS with the help of **Feynbrook**, one of NetDocuments certified channel partners in the Australian market.

"We chose NetDocuments because it is the only document management solution that addressed our requirements of ease of use and management, along with increasing the level of security for our documents and emails", said **Miz Brmbota**, IT Manager at Cooper Grace Ward.

The inhouse legal team at **Auto & General Insurance** in Sydney has selected **Lexis Visualfiles for Legal Counsel** as its new matter management and workflow automation platform. LexisNexis Pacific describe the new Visualfiles system as an "off the shelf solution" for corporate and government legal departments.

Other features of Lexis Visualfiles for Legal Counsel (*the italics are used by Lexis*) include document management, document and contract assembly, budget management and external law firm panel management.

Elsewhere within the APAC region, LexisNexis continues to enjoy success with its **Lexis InterAction** CRM system. The latest order is from leading ASEAN law and tax firm **DFDL** who will be rolling out InterAction to 250 staff across 12 offices in Bangladesh, Cambodia, Indonesia, Laos PDR, Myanmar, Singapore, Thailand and Vietnam. The firm's CEO **Michel Dauguet** described InterAction as "an essential part of our commitment to client development."



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9 – THE LAW SOCIETY + MICROSOFT DMS CONTINUED

99% OF FIRMS SAY THE LAW SOCIETY HAS IT ALL WRONG ...continued from front page

Possibly one of the most damning comments came from a former Law Society council member who recalls that when the topic came up for discussion “it was agreed that the Law Society did not have the skill or resources to get involved in providing legal software.”

And there's more!

Undaunted by these criticisms, the Law Society has also announced plans to launch a “revolutionary home conveyancing portal” called Veyo in the spring of 2015.

This is a joint venture split 60/40 between the Law Society and the systems house Mastek that aims to provide conveyancers with a ‘chain view’ status report on each transaction. Despite talk about the project having a £10 million budget, no demonstrations were available at the unveiling of Veyo earlier this month at the Law Society’s own conveyancing conference, nor were any details of pricing given, despite this being a notoriously price sensitive market.

Other aspects of the Veyo project that have the conveyancers we’ve spoken to scratching their heads include the fact you can already access the Land Registry’s online services directly (or via case management software) so why would you need to use the Veyo portal instead? Plus, the initial release of Veyo will not include an HMRC SDLT facility – yet this has been commercially available from some IT vendors for over nine years.

In fact many of the secure extranet aspects of Veyo, such as the ability to upload and review documents and monitor progress on matters, have been available in case management systems since at least 1998 when what is now Lexis Visualfiles launched SolCase Online.

Possibly the biggest question mark hanging over Veyo’s viability is that its admirable ambition of creating an encompassing ‘chain view’ of a series of conveyancing transactions (as distinct from just individual sales within the chain) sounds remarkably like the Land Registry’s ill-fated Chain Matrix project. This was abandoned in 2007 after at least £4.6 million had been spent on the Matrix. (Total Land Registry losses that year were £130 million.) And who was one of the most vocal critics calling for a halt to the public money being wasted? Step forward the Law Society.

MICROSOFT SCOPES OUT SHAREPOINT LEGAL INITIATIVE ...continued from page 2

Phase 2 will involve Microsoft working with some major law firms to get their feedback on the project. Currently Nishan’s team are working with two firms in the UK and two in the US.

Phase 3, which kicked off post-ILTA, is the early preview of the beta version of Matter Center for Office 365. Between now and the end of the year, this is being rolled out to 200 firms, with a further 100 to follow.

Phase 4 is to take the project public however Nishan warns that the go-to-market version “will take as long as it takes” to ensure it is robust enough. He added that the LCA team were adopting a “start-up mindset” and it may require multiple iterations to deliver the complete product set. Also still under review is the question of priorities and whether to focus on the needs of small firms first or large enterprise firms.

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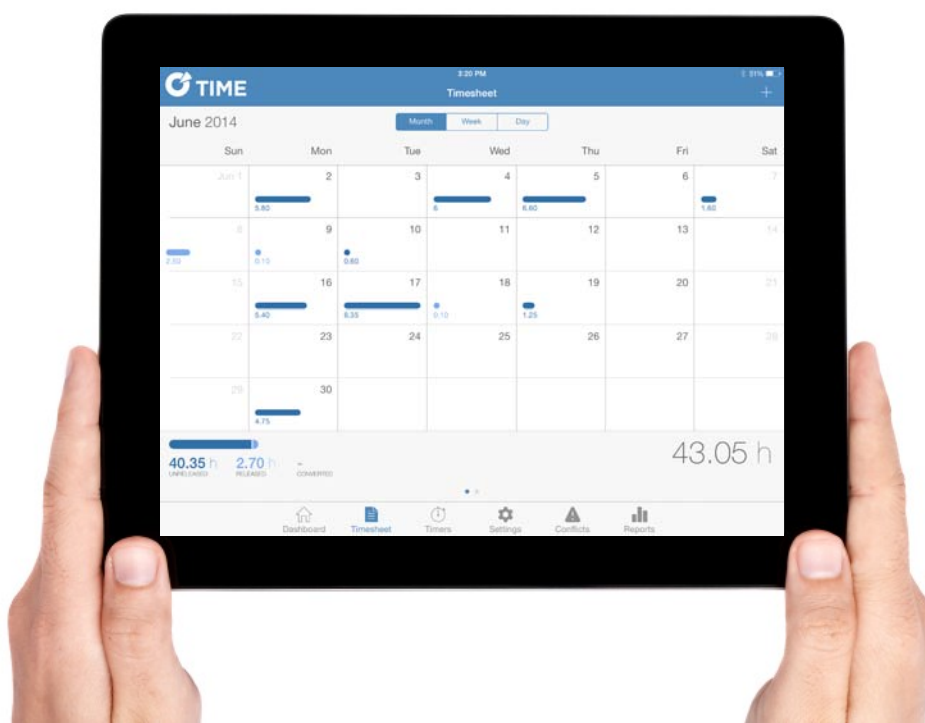
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Time for Better Time Entry



With firms standardising on new mobile platforms (or opting for “Choose Your Own Device” policies), mobile time entry is now a “must have.”

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

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1 — Source: The Legal IT Insider (“The Orange Rag”)

2 — Source: International Legal Technology Association

11 – MORE UK WINS & DEALS

WINS & DEALS CONTINUED FROM PAGE 7

UK WINS **Slaughter & May** is the latest major law firm to purchase the **Tikit TMS6** template management system. In other Tikit deals this month, both **Dickson Minto** and **Geldards** have bought the **HighQ Collaborate** cloud-based secure extranet collaboration platform from Tikit. And, Tikit Managed Services has been contracted by **Travers Smith** to provide managed services and out of hours support to its IT department.

Among mid-tier firms, 100-user criminal law firm **GT Stewart** has selected **Tikit Partner for Windows** (P4W) as its new case and practice management system. The firm said P4W's comprehensive legal aid functionality was a deciding factor. In addition **Beaumont Legal** has increased its P4W licences to support its growing conveyancing practice and **Grosvenor Law** has replaced an outsourced solution with P4W and **Carpe Diem Mobile** time recording.

Taylor Wessing has selected **RAVN Connect for Microsoft SharePoint 2013** to support the firm's knowledge management platform, while **Watson Farley & Williams** is taking the same system from **RAVN Systems** to extend its SharePoint capabilities and provide the firm with, in the words of head of IT Sam Luxford-Watts, a next-generation search platform "built on standard Microsoft technologies rather than proprietary search engines and web parts." (**DLA Piper** uses **RAVN Manage** to optimise and monitor global search, based on Autonomy IDOL, within its HP WorkSite DMS.)

Accountants **Moore Stephens** is now using **Linetime Liberate** case management software to support its national creditor services, while South Yorks law firm **Dickinson Wood** has selected Liberate to provide case management and online case tracking.

Swansea-based **Douglas-Jones Mercer (DJM) Solicitors** has signed a six-figure deal with **Solicitors Own Software** to replace its legacy software with SOS Connect case and practice management.

London and Northampton trademark, IP and patent attorneys **A A Thornton** have chosen **Trinogy Systems** to install an HP Worksite DMS.

Staying with IP attorneys, **Boulton Wade Tennant** has signed a 12 month services and support contract with **Phoenix Business Solutions** to centralise and optimise its document

management processes and become less reliant on paper. The firm already run HP WorkSite, supplied by Phoenix in late 2010.

Phoenix has just completed a firmwide WorkSite deployment at **Bindmans LLP** within an agreed five-month timeframe and been selected by commercial law firm **Wallace LLP** to deploy **HP WorkSite** as its new email and DMS platform. Wallace also becomes the second Tikit P4W-using firm in the past six months to select Phoenix MatterView to consolidate matter management. Phoenix is also supplying Wallace with **DocsCorp** contentCrawler and pdfDocs.

Essex law firm **Mullis & Peake** has implemented an **Eclipse Legal Systems Proclaim** practice management system, including RTA case management and support for the firm's Elderly Client, Family & Court of Protection work. Other Eclipse wins this month include Liverpool-based **Bartletts Solicitors** and social landlords **Wakefield & District Housing**, who will be running Proclaim to manage conveyancing and litigation.

South London Legal Partnership, the first four-borough shared legal service in London comprising Merton, Richmond, Sutton and Kingston Councils, has chosen court bundling and secure document delivery systems from **Zylpha** to run in conjunction with its **Lexis Visualfiles** case management software.

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Don't panic - the SRA won't get you!

Despite all the progress being made on the Microsoft SharePoint DMS/Office 365, there was a mild panic last week when a mid-tier UK law firm reported it had been advised that Office 365 was not SRA compliant. An added complication is the Solicitors Regulatory Authority party-line is that it is the responsibility of law firms to use compliant software but the SRA does not comment on individual products.

The SRA rule at issue states *Firms must be able to ensure that their provider can agree to SRA access to inspect data in order to meet Outcome 7.10 of the SRA Code of Conduct* – but Microsoft (in common with most legal sector cloud service providers, such as Clio, HighQ, Mimecast and NetDocuments to name just a few) will not allow physical access to its datacentres because they are high security sites.

But is this really an issue because the law firm can still keep a local copy of the data and provide the SRA with access to that. The SRA also concedes *There may be practical difficulties in accessing the information if it is stored overseas, but the point of the outcome is to try to reduce the risk of such difficulties. As with all of the outcomes, whilst firms must achieve them, the manner in which they do so is for them to determine.*

For the record, the Cabinet Office has approved the use of Office 365 cloud services across the UK government sector and the SRA itself uses Mimecast cloud services. Here's a link to the SRA guide on the risks of cloud computing: <http://cloudbox.legaltechnology.com/cloud-computing-law-firms-risk.pdf>

News in brief

WHO DARES BURY WINS NorthWest-based UK legal technology specialists **Converge TS** has moved into new offices in Daresbury, Cheshire, at the close of a year that has seen them grow by

nearly 50%, take on 10 new staff and invest £800,000 in their datacentre environment.

The company already provides cloud computing services to over 50 law firms and accountancy practices in the North West of England however managing director Nigel Wright says Converge TS plans to expand across the UK in 2015 and will be recruiting at least 10 further staff.

"We have an almost 100% client retention rate and the strongest pipeline we have ever had. The challenge now is about taking our message to the UK market," adds Wright. "We are currently ramping up our marketing activity and will be recruiting a sales team across the UK shortly."

TODS MURRAY SHAKEOUT Following the announcement at the beginning of October that the Scottish law firm **Tods Murray** had gone onto liquidation and been acquired by **Shepherd + Wedderburn**, the biggest loser on the IT front looks to be NetDocuments which loses Tods as one of its 4 sites in the UK top 200. Shepherd + Wedderburn is an HP WorkSite user. However it is business as usual for PMS as both firms are Aderant Expert sites.

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