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English Law Society planning monopoly IT deal?

The Legal Software Suppliers Association (LSSA), whose members represent about 80% of the installed law firms market for IT systems in the UK, says it is gravely concerned about a new initiative by the Law Society of England & Wales to "engage in a tender process to choose a preferred supplier of the software to become an endorsed partner of the Law Society, with unrivalled exposure to the legal sector."

What worries LSSA is the apparent secretive nature of these proposals, which have been leaked rather than openly publicised, with only a few of the 45 plus legal software vendors in the UK market contacted by the Law Society.

LSSA, which was an active supporter and sponsor of the Law Society's earlier *Software Solutions Guide* (arguably the only useful legal IT initiative Chancery Lane has ever offered its members ...Ed) says it is also intrigued by Law Society claims that the demand for the current *Preferred Supplier* proposals was "highlighted by research conducted last year." LSSA add "We are not aware of any discussion with the industry on this issue which we would regard as essential for a properly informed research project."

So how do you get to become a preferred supplier? The Insider has seen copies of the LSSA/Law Society email exchanges, in which the Law Society is less-than forthcoming, but vendors we have spoken to say the only criteria appears to be 'whoever is prepared to pay the most money'. The figures being mentioned are an annual fee of £50,000 to £100,000 plus commission on sales.

LSSA believe awarding one vendor what in effect is a monopoly franchise is impracticable "as a one size fits all system is impossible given the wide disparity of firms and budgets and the ability to shop around is the best protection for Law Society members that they are getting a fair deal."

LSSA also ask "Who will benefit from this proposal?" Adding "Whilst we have no interest in the Law Society's commercial activities we would like to know why they (the Law Society) feel that intervention in a very competitive market is considered of benefit to their members, as it could reduce competition. It is however clear the motivation of the Law Society is to raise money for the Law Society."

The latter contention is supported by the fact the initiative comes not from membership services but the Law Society's Commercial Affairs department. In fact the initial contact for the project is Rakhshinda Nazir, New Partnership Development Manager, whose official job description states: *To generate revenue by coordinating the design and development of new partnerships with third party Partners for the benefit of the Law Society's members.*

The Law Society declined LSSA's request for a meeting to discuss the proposed scheme.

+ See Editorial Comment on page 6

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

UK WINS **Wright Hassall** has become the latest law firm to deploy **Lexis InterAction** as its CRM platform. Over 250 staff are using the system at the firm's Leamington Spa offices. **LexisNexis** also reported this week that UK and EMEA new customer deals for InterAction grew by over 25% in 2013, compared with the previous year.

Regional law firm **Taylor&Emmett** has selected the Microsoft Dynamics-based Legal Services Platform from **Peppermint Technology** as its next generation practice management system.

Four more legal organisations have taken on library management software from **Bailey Solutions**. **DLA Piper**, **MacFarlanes** and **Howard KennedyFsi** have purchased the **KnowAll LMS** system, while the Law Society of Ireland has gone for KnowAll Enquire enquiry tracking software.

Hempsons Solicitors, which this month returns to the *Legal IT Insider UK Top 200* chart, has selected **Access SelectHR** as its new HR administration platform. The firm admits it previously had "a very basic system" that used Excel spreadsheets and other manual methods.

Patent and trademark attorneys **Page White & Farrer** has added **BigHand** speech recognition technology to its existing digital dictation system.

The housing and homelessness charity **Shelter** has signed up for a new practice management system from **Solicitors Own Software** to enable legal aid billing. It will be linked to the charity's case management software, now used by several hundred staff across 17 locations nationwide.

Fast growing Manchester-based injury claims specialist **Garvins Solicitors** is to implement Proclaim case management software from **Eclipse Legal Systems**. The deal includes Proclaim's A2A tool for processing portal claims for both RTA and EL/PL employer/public liability work.

Hampshire firm **MacDonald Oates** has selected DPSCloud from **DPS Software** as its full-service hosted accounts and case management solution.

In another HR/personnel deal, **Keoghs** has chosen **Fairsail** to provide its new cloud-based HR and HCM (human capital management) platform. Keoghs is also rolling out additional recruitment and payroll packages from Fairsail.

www.fairsail.com

Nikec Solutions has won an order from litigation-only firm **Stewarts Law** to implement Copitrak Secure Print to control costs and reduce waste in its print and document production work.

DTM Legal has awarded **Converge IT** a contract to provide seamless IT and comms connectivity between the firm's Chester HQ and new Liverpool office.



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3 – US WINS & DEALS

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US WINS **Frost Brown Todd**, which has 9 offices and 1000+ people in the Midwest has swapped out its **HP iManage** on-premise DMS in favor of a cloud-based a document and email management system from **NetDocuments**.

The firm's CIO **Paul Bromwell** said "After evaluating the various players in the market, we selected NetDocuments because their modern approach to this technology provides us with the security, accessibility and collaborative features that we need to operate in the coming years."

COMMENT: NetDocuments claims to have carried out "over 100 iManage swaps" plus "many more OpenText and Worldox switches." And add that "it's our time to capture the market and the prospects are starting to queue up." HP iManage deny these figures and say NetDocuments are "utterly delusional" if they think they can take the DMS market from iManage and point out that the London office of **Hausefield & Co** recently switched from NetDocuments to iManage.

Two further comments: HP iManage is now offering a hosted version of WorkSite so it can provide a cloud DMS option for firms that want it. And, it is interesting to see the DMS battle is still being fought by specialist DMS solution providers, with SharePoint-based DMS continuing to gain little or no traction anywhere in the world.

Seyfarth Shaw (also featured last month) has signed a managed services agreement with **Iris Data Services** for ediscovery and hosted document review through the Iris Discovery Management program, which includes using the **kCura Relativity** ediscovery platform.

Capensys has recently been awarded training, up-skilling and assessment projects by a number of law firms including **Schwabe Williamson & Wyatt**, **Hinshaw & Culbertson**, **Nixon & Vanderhye** and **Cozen O'Connor**. The company's LTC4 (Legal Technology Core Competencies Certification Coalition) which was set up two years ago to set industry standards has now grown to 35 member firms.

The global law firm **Dentons** has deployed the web-based **CPA Global Inprotech IP** management system to support its growing IP

practice. Inprotech combines patent and trademarks into one core system.

Microsystems has reported a total of 24 more wins for its 3BClean and EagleEye products including **Fried Frank Harris, Greenberg Traurig, Wilson Sonsini** and **Shearman & Sterling**.

Latsha Davis & McKenna, which has offices on the East Coast, has upgraded to pdfDocs Binder from **DocsCorp**, **Clark Partington Hart Larry Bond** has implemented the DocsCorp product suite in all its Florida offices. And, **Wilson Sonsini Goodrich & Rosati** has selected DocsCorp contentCrawler to make files text searchable.

WINS & DEALS CONTINUED ON p.5

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5 – APAC+ EMEA + BAR + MORE UK WINS & DEALS



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MORE UK WINS

Egress Software Technologies is on a roll with two more law firms – **Thomson Snell & Passmore** and **Barcan Woodward** – selecting Egress Switch for email encryption and to protect the sharing of confidential information with 3rd parties. Other recent Egress Switch customers include **London Borough of Croydon**, **Guys & St Thomas NHS Foundation Trust**, **North Yorkshire County Council** and the 32 authorities within **London Councils**.

News from **Norwel**: the company has completed a three-into-one database consolidation project for long-time customer **Trowers & Hamlins**. The project included consolidating 200 million rows of matter and case data from the firm's London, Manchester and Exeter offices. Norwel has also completed a paperless office project for **Stockport Council**, implemented a Prescient case management system at **Waltham Forest Council** and trialled a new *Jackson* costs management project with **Anthony Gold Solicitors**.

Select Legal Systems reports that 23 more firms signed up for its LawFusion system in 2013, the majority, including fraud specialists **ABR Solicitors** and family law pre-nup specialists **Jones Myers**, practising in niche areas of law. Most of the new LawFusion sites have opted for Select's LawFusion Direct cloud option.

APAC WINS

The big Anglo-Australian **Herbert Smith Freehills** merger is continuing to make waves with the latest deal announced being an order for risk and compliance software from the **Frayman Group**. The firm will be deploying Frayman's Compliguard business intake workflow, conflicts management and information barriers modules.

EMEA WINS

DocsCorp continues its inroad into Continental Europe with sales of pdfDocs, compareDocs and related applications to **Homburger** in Switzerland and four law firms in the Nordics: **Vinge** in Sweden plus **Kylingstad Skeveland, DA & Raeder**

Advokatfirma and Advokatfirmaet Haavind.

The Dutch law firm and notaries **BarentsKrans** has selected **HP Autonomy WorkSite** as its new document management platform, with **I.R.I.S.** selected as its implementation partner. The firm has 125 users.

ENGLISH BAR WINS

In a competitive tender, London barristers chambers **11 King's Bench Walk (11KBW)** has awarded **SproutIT** a contract to provide all on-going support, consultancy and strategic advice.

Staying in London, the **3 Temple Gardens** set has completed its migration from Meridian Law to Meridian Law Connected from **Advanced Legal**.

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Law Soc in legal IT La La Land - again !

The English Law Society's relationship with technology is a classic example of the old adage that the most important lesson of history is that nobody learns the lessons of history.

What we see with the *Preferred Supplier* initiative (see *front page*) is a repeat of how the Society has dabbled in legal IT over the past 30 years. Sometimes it gets it right: such as the *Software Solutions Guide*. Sometimes it gets it spectacularly wrong: such as the *High Street Starter Kit*.

HSSK was an attempt by the Society to develop its own legal software system to sell to solicitors. It was finally scrapped in March 1997, one month after it was due to ship (it had been predicted that 500 firms would buy it in the first 12 months) when it became clear it would require at least another £770,000 and many more months work to bring to market. At the time, the Law Society Council said the Society should not be reinventing the wheel, developing products and services inhouse that were already commercially available in the outside world.

It's worth noting Chancery Lane also regularly gets it wrong with its own internal IT projects. It was one of the last organisations on the planet to buy Wang, with Wang going into Chapter 11 before the Society had completed its rollout. It backed HP NewWave as a GUI, only to see the rest of the world go with the standard version of Microsoft Windows.

And it struggled for years (and in fact the SRA is still struggling) with its REGIS membership database which came in £7.5 million over budget and initially still didn't work properly.

Neil Rose of *Legal Futures* recalls attending a Law Society staff Christmas pantomime that featured a comedy character called Regis the Robot. Regis would stagger briefly round the stage before seizing up, only to restart when more money was thrown at it!

As for the latest initiative, it is interesting that a large section of the Law Society's membership has been banned from paying referral fees (and seen their practice incomes damaged as a consequence) yet the Law Society itself is happy to solicit referral fees and commissions from a "preferred supplier."

...Charles Christian

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Dispatch from New York on NewLaw

Guest comment by George Beaton, director, Beaton Capital, www.beatoncapital.com

In the first week of February while thousands of IT, KM, ediscovery professionals and others were making the annual pilgrimage to the massive *LawTech* event in mid-town New York, two significant legal industry events made news among the 800+ delegates at the *ReInvent Law* conference in lower Manhattan.

Each could have been just another news story. But the collapse on February 5 of Heenan Blaikie, an establishment Canadian BigLaw firm, and the announcement on February 7 of British Telecom's appointment of Axiom Law, a NewLaw firm, to handle commercial and anti-trust matters made waves.

Heenan Blaikie was a 500 attorney, 40 year-old firm with high profile partners, including former prime ministers, premiers and judges. Declining profits, tensions between offices and a divided leadership combined with the hostile environment for law firms to cause partner flight in large numbers – and an abrupt dissolution.

On the other hand, Axiom Law is a 12-year old, 900 person firm that serves half the Fortune 100 from 10 offices across the world. The BT–Axiom Law deal is for commercial contracts and anti-trust work in the UK, US and Asia. This will drive Axiom's 30% compound growth that put them at rank 61 in AmLaw 100 tables in 2013, after being at 172 spot in 2012.

A bitter pill for BigLaw firms

The juxta-positioning of the announcements is a bitter pill for BigLaw firms (*BigLaw* is the business model of 99% of traditional law firms, not a description of their size). And it is great encouragement for NewLaw businesses (*NewLaw* is also a business model description of providers that have only a few characteristics in common with BigLaw).

BigLaw is a \$500billion global industry, and its firms are still very profitable by any standard. The many thousands of large BigLaw firms around the world are structured as partnerships and have perhaps as many as 500,000

owners. These partners are resilient, hard working, clever – and earn very large incomes. Their stake in ensuring the continued prosperity and reputation of their firms is a powerful motivation to respond to the changing environment of their clients and NewLaw substitutes.

This response must mean transforming their business model to meet new demands of clients and new forms of competition. *ReInvent Law* speakers were divided on the prospects for BigLaw's appetite and capacity to reinvent themselves. In my opinion some BigLaw firms will very successfully adapt, but many won't.

How fast is the light in the tunnel coming towards BigLaw?

The biggest uncertainty is how fast the light in the tunnel is coming towards BigLaw. On this opinion is divided. Some, including big names in NewLaw believe the tipping point is 10 to 20 years away. Others point to signs that suggest the disruption is already occurring.

Whatever the right answer, it means more Heenan Blaikie-style collapses, as have occurred over the last decade. Only they will come at a faster rate.

But the majority of firms will not fail, they will compete away their super-profits in the struggle to maintain revenues and their partners will earn a modest fraction of what they do today.

• Dr Beaton's most recent book *NewLaw New Rules* is available on Amazon.

On the Web - Editor's Pick

- Is "making KM fun" an oxymoron? (6 February) www.legaltechnology.com/latest-news/comment-is-the-phrase-making-km-fun-an-oxymoron
- Priori Legal aim to Reinvent Law (7 February) www.legaltechnology.com/latest-news/priori-offering-a-neat-approach-to-law-firm-referrals-see-them-at-reinvent-law-today
- Positively 54th Street: Six observations from LegalTech New York (11 February) www.legaltechnology.com/events/positively-54th-street-six-observations-from-legaltech

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Fresh on the Radar

SPROUT WHO? SproutIT has been winning more and more business in the UK barristers chambers market so here's a little more information about them. SproutIT are based in the Temple (the traditional legal area of London for non-UK readers) with a focus on offering a full range of legal IT outsourcing services, including cloud technologies.

Director Matt Torrens says that the company is moving into new offices this year and, with new and developing opportunities with chambers across London and the UK, will "continue our drive to be the leading supplier of IT services to the Bar."
www.sproutit.co.uk

7SAFE FOR EDISCOVERY Now for one of those rarities: a UK-based ediscovery business. Called 7Safe and originally founded by Alan Phillips and Dan Haagman, the company was acquired by the PA Consulting group two years ago and initially operated as an ediscovery and forensics consultancy. However, in the words of Dan Haagman, "we had been listening to the market on the need for a tool to preview documents and take a very simple, quick and effective first pass at a matter before needing to process and host."

Working in conjunction with consultants such as Andrew Haslam, 7Safe has now launched its Doc Discovery tool for running ECA (early case assessment) projects on email archives, as well as subject access/data protection searches of PST files (including attachments). However, the emphasis is upon speed, usability and affordability, so it is a viable tool to use in smaller matters, does not require extensive training and delivers immediate efficiencies, such as the ability to generate an index in 6 minutes rather than 90. There is a good explanatory video at www.docdiscovery.net

PUTTING LEX IN THE MACHINA Next stop Menlo Park where tech startup Lex Machina has launched its Legal Analytics system, which is described by company general counsel and 'chief evangelist' Owen Byrd as "providing the winning edge in the highly competitive business and practice of law."

Essentially, Legal Analytics uses big data style techniques to mine litigation data (currently in the IP, ITC and anti-trust fields) to reveal meaningful patterns of behavior by judges, counsel and parties to predict the likely outcomes that different legal strategies will produce. Byrd adds that lawyers have always done this but now Lex Machina replaces anecdotes with objective data.

Lex Machina recently secured \$4.8 million in funding and recruited former Google deputy general counsel Miriam Rivera to its board of directors. The company lists Wilson Sonsini, Fenwick & West and Bingham McCutchen among its law firm users. <https://lexmachina.com>

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10 – THE LATEST INSIDER UK TOP 200 CHART

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Who's hot and who's not? - the Insider UK Top 200 chart

We have just published the latest iteration of the UK version of the **Insider Top 200 Chart**, showing the key systems currently being used by the country's largest law firms in 2014. You can access an Excel version of the chart free of charge here (as well as our archive going back to 2003... www.legaltechnology.com/top-200/)

It's an unusual chart this year, with several mergers looming, a record number of new entries and all the signs of further consolidation taking place over the next few months. We've also taken the controversial step of including two ABS legal services providers – Slater & Gordon and Co-op Legal – in the chart. Not to do so would amount to ignoring two very large elephants in the room.

Finally, for analysis purposes, we are looking at the results both overall and with a split between *Large Law* and *Mid-Tier* firms. This reflects the fact smaller firms tend to have substantially smaller inhouse IT resources and buy from a different group of vendors. Our cut off point for Large Law is firms with a turnover of £80 million or more, which goes all the way to RPC at number #45 in the chart and includes all the *Magic Circle*, *Silver Circle* and major national firms

We currently have 15 product categories in the chart however we will focus on just five: Accounts/PMS - DMS - Case Management/Workflow - Voice/Dictation - CRM/Marketing

THE BIG PICTURE

• Accounts/PMS

Of the firms we have data on, 43% are using Thomson Reuters Elite products (Enterprise, 3E or Envision), 14% are using Aderant, 12.5% on Lexis Axxia and Eclipse, SOS and Tikit (Firmware or P4W) level pegging with 5.75% each. The remaining 13.25% of the market is shared between a total 10 further vendors.

• Document Management

DMS always used to be a straight fight between HP iManage and Open Text however this year iManage has a 68% share, while OpenText can now muster just 8.5% of the market. Of the remainder, other DMS offerings (including Sharepoint) have a 10.75% share but PMS and case management applications with a DMS function, trump this with a 12.75% slice.

• Case & Workflow/BPM Management

This has always been a catchall category with niche products, such as Isokon for probate and Linetime for debt recovery work, as well as many firms opting for multiple, departmental solutions. A total of 154 firms are running one or more of 38 different systems.

The market leader remains Lexis on 28.5% (with its Axxia, Solcase and Visualfiles products), following by Thomson Reuters (with its Elite and Flosuite products) on 26.5%. Next comes Eclipse Proclaim with 15.5%, then OpenText BPS (the old Metastorm system) on 11.75%, followed by Linetime of 10.5%, Isokon on 9% and Advanced Legal with 5.5%.

• Voice & Digital Dictation

What can we say, it is a BigHand world. A total of 180 firms in the chart have this technology and 147 of them (or 81.7%) have selected BigHand. The runner up is Winscribe (either directly or via channel partners) on 13.9%. Four other suppliers taking up the rest of the market although only of them – Crescendo – has more than one site

• Marketing & CRM

Not that too long ago it was a choice of Lexis InterAction or nothing but has anything changed? Of the 118 firms currently putting their hands up to owning CRM systems, 55% are running InterAction, followed by 16% with Elite Contact Manager. Next come the Microsoft Dynamics CRM-based systems with an 8% share, including 4 Aderant sites. Then we have Metis and Elite Envision, each with 7%, and finally five other vendors with a total of 9 sites (8%) between them including Tikit with 4 sites.

11 – THE LATEST INSIDER UK TOP 200 CHART

ANALYSIS: LARGE LAW -v- MID-TIER

When it comes to large firms, the distinction between the market leaders and all other suppliers is more pronounced, whereas among mid-tier firms there is a far wider spread of vendors.

Accounts/PMS

Large Law:

Elite - 60% / Aderant - 31% / Others - 9%

Mid-Tier:

Elite - 38% (mainly Envision) / Aderant - 9% / Others - 53% (including Lexis Axxia - 16%)

Document Management

Large Law:

iManage - 78% / OpenText - 13% / Others - 9%

Mid-Tier:

iManage - 62% / OpenText - 6% / Others - 32%

Case & Workflow/BPM Management

This is the exception to the rule but the key

distinction is that among large firms, while 64% are running what might be termed *traditional* volume case management systems, a massive 54% are also using BPM (business process management and workflow) products. This is in marked contrast to mid-tier firms where 97% are running traditional case management but a mere 12% are also running BPM software.

Voice & Digital Dictation (another exception)

Large Law:

BigHand - 84% / Winscribe - 12% / Others - 4%

Mid-Tier:

BigHand - 81% / Winscribe - 15% / Others - 4%

Marketing & CRM

Large Law:

InterAction - 78% / Elite Contact Manager - 22%

Mid-Tier:

InterAction - 43% / Elite Contact Manager - 13% / Others - 44% (including Microsoft Dynamics CRM based applications - 12%)



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The inaugural **Legal Industry Video Awards 2014** are open for video submissions from law firms, legal service providers, in-house legal and the legal industry. The Awards have eight categories covering legal marketing, news, training, events, media and ediscovery (with separate categories for legal services and vendors) and will culminate in a virtual film festival and an Awards ceremony.

The Awards are open to anyone in the legal industry and do not have to be IT related. International entries are accepted. Submissions are judged on creativity, technical quality and matching stated objectives. Trophies and certificates will be awarded to finalists and overall winners in September 2014. Videos accepted up until start of judging **June 30th 2014**.

The originator of the Awards, Charles Christian, said: "The legal industry is increasingly investing in creating videos that inform, educate and better market their services and products. We want to recognise and reward this effort and showcase the best of the best."

The Insider will host all the videos on its website with coverage and updates via media partners and social media. Full details, including rules, T&Cs and online entry forms available here: www.legaltechnology.com/category/video-awards-2014

10 years ago today

The big UK news in February 2004 was the launch of the latest edition of the English Law Society's *Software Solutions Guide*. This edition of the guide offers an interesting trip down memory lane, as of the 14 suppliers listed, only 5 (DPS, Eclipse, Edgebyte, Quill & SOS) are still independent in 2014 whilst the other nine (AIM, Axxia, JCS, Laserform, Mountain, MSS, Opsis, Pericom & TFB) have all been acquired, merged or else sold off their legal IT operations to Advanced Legal, Lexis Nexis, Cognito, Thomson Reuters and BT Tikit.

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