insider

Legal IT's leading news resource

Top stories in this issue...

- OpenText Metastorm still life in the popular BPS system p.2
- Meeker says DocuSign digital signatures will forever change the way we work p.2
- Plus all the legal IT world's latest wins and deals starting on p.3

Elite loses its mojo?

It has not been a very good month for Thomson Reuters Elite, with other vendors announcing a record number of firms defecting from the Envision and Enterprise platforms.

Over in North America, the last couple of weeks have seen three Elite Enterprise sites announce they were moving to Aderant. The three are Birmingham, Alabama-based 230 attorney Maynard Cooper & Gale, 500 lawyer Canadian law firm Miller Thomson, and 1100 lawyers USbased global firm Holland & Knight. This brings to 32, the number of Elite firms that have switched Aderant over the past four years. The majority are Enterprise sites but there are also two 3E sites.

In the UK, the last fortnight has seen three Elite Enterprise sites announce they are moving elsewhere, rather than upgrading to 3E. The sites are UK top 40 site Fieldfisher, which becomes the largest UK law firm to-date to order the LexisOne system from LexisNexis Enterprise Solutions. Plus Penningtons Manches and Cripps LLP, both in the UK Top 100, who are moving to Peppermint Technology's Legal Service Platform.

The latter two, incidentally, are both "Big 3 swapouts" in that the firms plan to eventually rollout Peppermint to replace not just their Elite PMS but also their HP WorkSite DMS and LexisNexis InterAction CRM systems.

Then there are all those Elite Envision (aka Pilgrim LawSoft) sites in the UK who remain unsettled by the end-of-life statement Elite issued late last year. Last month niche London commercial practice Maples Teesdale announced it was to replace Envision with SOS Connect from Solicitors Own Software, while Eclipse Legal Systems has secured two Envision swapout deals (and an Elite Mattersphere swapout) this month although the names are currently still under embargo. (Last year, incidentally, also saw Wedlake Bell announce it was moving from Envision to LexisOne.)

However every dark cloud has its silver lining and Exen Legal Solutions reports it is now receiving a steady stream of orders for its Exen SmartEye law firm dashboard and BI (business intelligence) solution from Elite Envision sites wanting improved management information from their legacy software rather change their entire back office systems. The three most recent Exen Envision wins are Anthony Collins Solicitors in Birmingham (UK), Guildford-based Stevens & Bolton and Tees Valley firm TBI Solicitors.

Insider Top 200 now includes Irish firms

The Legal IT Insider Top Chart has been expanded to include the largest Irish law firms (Arthur Cox, A&L Goodbody and Matheson all make it into the top 50) as well as the largest firms in the UK.

Vital Statistics: With the revenue for all firms totalling £20.86 billion (£20,860 million) we estimate the UK and Irish law firm market's current IT spend (including salaries) is approximately £885 million (US\$ 1397 million) a year.





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Still life in OpenText Metastorm yet!

Last month's Insider story about the future of OpenText BPS prompted a flurry of comments, if not a metastorm in a teacup, with both law firms and systems houses saying "No, there's still life in the old dog yet."

Jon Summers of Stickleback Technologies points out that OpenText recently issued details of continued support for both v.7 and v.9 of BPS. He adds that all the law firms his company deals with run either v.7.6.4 – on maintenance until January 2018, or v.9.3.2 – on support until June 2019, so the end is by no means nigh. In fact in the UK alone Summers calculates there are over 14,000 active daily users of BPS spread across 10 firms.

According to Summers with OpenText now offering a clearer and more attractive migration route from older versions of BPS to the next generation v.10 successor product, he expects most firms will stay with OpenText rather than go elsewhere. He adds that far from treating BPS as a legacy product, a number of larger firms are currently making a "not insignificant investment and commitment" to their BPS platforms. Support for mobile working and/or digital signatures (now regarded by some firms as a key to mobility) plus anti money laundering and know-your-client processes are the main focus of investment.

Esignatures are go

OpenText (see previous story) can, incidentally, support both embedded and third-party open standard digital signatures, which brings us on to DocuSign*, which held its EMEA conference in London at the start of June. Glossing over comedian Jimmy Carr's funny but strictly non-PC jokes, during the legal industry panel session John Hunter, head of IT at the European Court of Human Rights, said the way he convinced his senior management to buy into a digital signature

project was to demonstrate how easy it was to forge their signatures using simple scanning and WP technology. On a more serious note, Hunter said the shift to esignatures had transformed the ECHR's ability to process cases and is a major factor in reducing delays and backlogs.

If you are concerned about the legality of esignatures, check out this resource https://www.docusign.com/how-it-works/legality/global

• In March this year, DocuSign acquired ARX CoSign, which is probably a better known digital signature product in the legal market, offering integrations with OpenText BPS, K2, SharePoint and Office 365. Noted Kleiner Perkins VC and technology commentator Mary Meeker last month described DocuSign as "one of 16 startups that will forever change how we do our jobs."



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Who's in & who's out: the latest wins

UK WINS Two more law firms – **Poole Alcock** in Cheshire and **Beswicks Legal** in Stoke – have switched from their incumbent digital dictation platforms to **BigHand** solutions. Tim Knight of Beswicks said BigHand's ability to integrate with the firm's new **Tikit P4W** case management system and support for a Microsoft-based mobile strategy were determining factors in the decision to switch.

Following the implementation of Intapp Wall Builder, **Shepherd + Wedderburn** has selected **Intapp Open** and Intapp Flow to help automate business processes, including new business intake and workflow management.

RPC (Reynolds Porter Chamberlain) has become the latest City firm to adopt the LexisDraft legal document proofreading system from LexisNexis UK. LexisDraft operates as an extra toolbar within Microsoft Word.

Travers Smith estimates it will reduce the footprint of its datacenter by 70% when it completes the migration to an adaptive flash platform supplied by Nimble Storage. Along with a reduced footprint, the Nimble Storage CS300 Series array will also provide the firm with increased storage capacity and performance. The firm's existing storage architecture uses a combination of SSDs, SAS drives and SATA drives.

As part of its BWOW (better ways of working) initiative, **DAC Beachcroft** has selected the **Zylpha** electronic bundling system to create document bundles for trials, case management conferences, client reports and board minutes.

Mediation, family and employment law startup Consilia Legal (the firm charges "a pragmatic fixed fee" rather than the traditional billable hour) has implemented a Proclaim practice management system from Eclipse Legal Systems. The project included a bespoke mediation solution as well as out-of-the-box family and employment case management software.

Phoenix Business Solutions has won HP WorkSite upgrade deals from **Trowers & Hamlins**,

and Taylor Wessing UK. Accountants Moore Stephens and the States of Guernsey Law Offices of the Crown are purchasing new HP WorkSite document management systems via Phoenix. And, HowardKennedyFsi has purchased the HighQ system, plus the Phoenix HighQ-to-WorkSite content sync application, from Phoenix.

Fast growing Leicester-based law firm J B R Morgan (corporate philosophy: "the client is king") which recently opened an office in London, has selected a DPSCloud hosted case and legal accounts management system from DPS Software rather than have "to get involved in hosting our own servers".

Norton Rose Fulbright in London has purchased pdfDocs from **DocsCorp**.

WINS & DEALS CONTINUE ON PAGE 5







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WINS & DEALS CONTINUED FROM PAGE 3

NORTH AMERICAN WINS Along with its Elite swapouts (see front page) Aderant has also announced an Aderant Expert win at 95-lawyer Brookes Pierce McLendon Humphrey & Leonard in North Carolina and a Total Office win at 44 lawyer Goldberg Weisman Cairo in Chicago.

Shearman & Sterling has licensed **kCura Relativity** ediscovery software for their inhouse processing through to production needs.

Foley & Lardner has taken an enterprise license for the eDepoze cloud-based deposition software. The system will allow attorneys to create paperless depositions, marking up exhibits electronically on laptops and iPads instead of binders and boxes of paper exhibits.

MSA - The Safety Company, one of the largest global manufacturers of workplace safety and protection products, has implemented the FoundationIP system from CPA Global to provide an integrated patent renewals services and IP management platform. FoundationIP is a hosted, web-based system that MSA selected from a field of 20 competitors. MSA say the CPA has reduced its IP portfolio maintenance costs by 30%.

Little Mendelson has become one of the first law firms to sign up for the **Blur** online marketplace for tendering for business services. **www.blurgroup.com**

APAC WINS Australian law firm **Henry Davis York** has implemented **Intapp Flow** to automate its business processes and workflows. The firm has been using Intapp Integration Builder since 2012 and has also deployed Intapp Time (it was originally a DTE site) for time recording.

Sydney-based **Buddle Wilkins Lawyers** has purchased **DocsCorp** pdfDocs, while **Sparke Helmore** has added compareDocs to its portfolio of **DocsCorp** products.

New Zealand law firm **Kensington Swan**, which has offices in Auckland and Wellington, has implemented **Nuance Power PDF** to help move away from paper (the firm uses 5 million sheets of A4 annually) to digital documents and storage. The project has included integration with the firm's HP

WorkSite DMS, with an added benefit being it allows the firm to create small-sized PDF files.

EMEA WINS Belgian law firm **Van Bael & Bellis** has selected **I.R.I.S. Nederland** to implement its new **HP WorkSite** email and document management platform.

Hjort Law Firm in Norway has switched from Workshare to **DocsCorp** cleanDocs.

Anjarwalla & Khanna in Kenya, which already runs HP WorkSite in its Nairobi office, has awarded Phoenix Business Solutions a contract to supply and support the DMS in its Mombasa office. The implementation project will include integration with the firm's Maconomy ERP system.

WINS & DEALS CONTINUE ON PAGE 6



WINS & DEALS CONTINUED FROM PAGE 5

MORE UK WINS
Roythornes, which has
160 staff in offices across the East of England, has
upgraded its systems from Solicitors Own
Software to include the SOS Connect email, case
and document management system. SOS Connect
will replace the firm's legacy LexisNexis Visualfiles
case and matter management system. The Family
Law Company in the South-West has also replaced
its incumbent IT system with SOS Connect.

After an extensive RFP process, **Clifford Chance** has selected the **AnyData Solutions KWIQVIS** system for global integrated supplier spend analytics and contracts.

ShenSmith Barristers, which provides marketing, administration and clerking services to independent barristers and sets of chambers, is now also able to offer video conferencing services, via video provider **ODRO www.odro.co.uk**

Two more law firms – **Hek Jones** in Cardiff and **Wright Solicitors** in Dudley – have deployed the **Ochresoft Intelliworks** cloud-based, pay-per-

case, residential conveyancing workflow system. Wrights report that after one year of using the Intelliworks system, their conveyancing business has grown by 83% but with only the need to add just one extra member of staff.

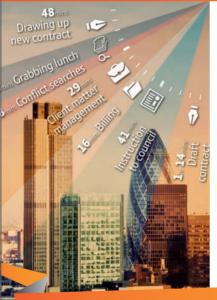
MJP Conveyancing (Morgan Jones & Pett) is now running the Lawyer Checker AES (Account & Entity Screen) search on all residential conveyancing transactions to verify recipient accounts are bona fide.

Perth-based **Kirklands Business Solutions** has won the contract to provide members of the **Law Society of Scotland** with an anti-money laundering (AML) compliance system, including an automated sanctions list checker and electronic ID checks from Equifax and Companies House. The system is being formally launched in July.

Richard Griffiths & Co is the latest law firm to take advantage of the **Quill Pinpoint** outsourced legal cashiering service, which offers both long and short-term contracts, including coverage for maternity leave.

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Aderant previews new applications

Aderant took advantage of its recent Momentum conference in London to preview some of its new products. These include **Spotlight**, a BI system that combines the best of the Aderant's current ClearView and Redwood BI products but with a proactive element to highlight data problems and suggest where improvements can be made.

Aderant's Derek Schutz said much of the focus of Spotlight's development (a web based product – unlike ClearView, it does not require SharePoint – scheduled for a Q3 2015 release) was on simplicity, the provision of 'relevant' information and a UX/user experience designed to encourage the system's use. Schutz said most traditional BI 'traffic light' type dashboards were only used for three weeks and then forgotten whereas Spotlight was intended "to be easier than picking up a phone and calling accounts!"

Workflow

Intapp

Software for a Changing Legal Market

The second product – currently called **Case** (scheduled for a Q2 2016 launch – is an all new case management system designed to meet the needs of the UK & APAC high volume/low value case and matter management market plus the US concept of repeatable process work and support the North American S&B market. The new system will include its own DMS and document assembly functionality (although it will also integrate with HP WorkSite) as well as supporting mobile working on iPads.

Aderant's Mike Barry said the company had taken the decision to build Case from scratch (including the TaskFlow customizable process automation "glue that drives the system" because there was nothing on the market to buy that adequately met all these needs.

He added "We are a software company not a legal content company dabbling in software. We listen to the market and much of Aderant's recent success is down to our strategy of focussing on the front office rather than on back office systems."



All change at LSSA as Hancock retires

Matt Lancaster, the sales & marketing director of Osprey Legal Cloud has been appointed as the new chairman of the Legal Software Suppliers Association (LSSA), the UK industry body for legal systems developers and vendors.

Dominic Cullis of Easy Convey takes up the role as vice-chair. Phil Snee of Linetime continues as treasurer and Patrick Carmody of Perfect Software as chair of the Membership Committee. Steve Dixon of Select Software will now chair the Disciplinary committee.

Last week's LSSA AGM also saw Roger Hancock retire as the association's chief executive, a role he has occupied for over 19 years. Glyn Morris succeeds Hancock as chief executive. Although Morris is the outgoing LSSA chair, he has since resigned from Advanced Legal to focus on his LSSA duties.

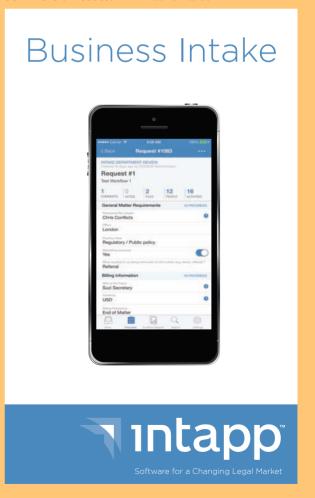


Fresh on the Radar: eBrevia AI

Following last month's story about RAVN Systems moving into AI (artificial intelligence) with its ACE applied cognitive engine for analysing the content of legal documents, US legal tech startup eBrevia has just launched its own AI offering.

Called Bespoke, the system uses machine learning technology to extract custom terms relevant to a particular client's industry or project, to support faster and more accurate contract review and management. With Bespoke, firms can either have eBrevia's subject matter experts "train" the software to identify custom terms or else open up the system so organisations can use their own industry expertise to train the system.

Earlier this year eBravia launched Lease Abstractor, a system to automate the review and extraction of legal and financial data from commercial leases, www.ebrevia.com



legalitinsider EDITORS CUTS

The most widely viewed feature stories on the Insider website at the moment are...

Passing Clouds: The Cloud Club – client consent not required? Should law firms ask for client consent before putting their data in the cloud? Clients think so, as our associate editor Caroline Hill finds out after asking a number of GCs within FTSE 100 companies, including HSBC and Vodafone, as well as Network Rail, where GC Suzanne Wise said "I would want to be informed."

The Solicitors Regulation Authority also says there are circumstances where client consent should be a prerequisite. However, the logistics of consulting potentially thousands of clients across multiple jurisdictions with differing regulations and internal policies means that most of the law firms that have already moved client data into the cloud – either platform-as-a-service (PaaS) or software-as-a-service (SaaS) – have taken the decision not to conduct a blanket consultation exercise with their clients.

Their argument is that clients' data has never been so secure. At Keystone Law, which operates a heavily IT-reliant dispersed model and signed up to NetDocuments SaaS platform earlier this year, IT director Maurice Tunney said "Most of our clients are start-ups or small-to-medium enterprises who want to be assured that their data is secure and for our larger banks and insurance companies, we have not had any concerns raised about the fact that their data is stored in the cloud. If it was raised then we would re-assure them that it is highly secure and meets all the necessary security accreditations and requirements."

But clients are rightly worried about third party and government access to sensitive information, and many still have a blanket ban on data being put in the cloud, creating the unusual possibility that a law firm's IT arrangements may become a bar to winning or retaining business.

At Farrer & Co, which went through a stringent DMS tender process involving numerous partners as part of an 11-strong project committee before signing with NetDocuments, IT director Neil Davison said "In some cases it may mean we can't take the work. Every firm experiences times when they can't accept and can't take on the work – but it is changing."

Client attitudes are certainly evolving but with the Magic Circle actively looking at cloud options, given their heavy financial institution and corporate client base, not to mention the tendency of the rest of the market to follow their lead, is it time to revisit first principles?

www.legaltechnology.com/latest-news/passing-clouds-the-cloud-club-client-consent-not-required

An Interview with... Dana Denis-Smith, founder & chief executive of 'NewLaw' contract lawyer supplier Obelisk Support Regarded as one of the most forward thinking women in the business, Dana talks to Insider associate editor Caroline Hill about innovation, technology and what the legal market will look like in 10 years' time.

www.legaltechnology.com/latest-news/an-interview-withdana-denis-smith-founder-and-chief-executive-of-newlaw-contract-lawyer-supplier-obelisk-support/

Leadership

- 84% of the Global 200
- 4 of 5 Magic Circle Firms
- 92% of the AmLaw 100
- 185,000+ lawyers
- 550+ customers



People & Places

In a rare example of someone returning to the legal IT sector after escaping to the real world (and no longer having to deal with partnership politics)

Jon Gould is back in the industry as the new IT director at Blake Morgan. Gould, who was the head of IT at Charles Russell and later Burges

Salmon during the period 2001 to 2009, replaces

Viv Eadon who has left the firm after 14 years to become an independent consultant. Gould says his years in the non-legal world were a fascinating mix, including working at Balfour Beatty, holding some non-exec director roles, running a food shop in Bristol, and "doing up" properties.

LDM Global has promoted **Ben Wilson** to project manager and hired two new project coordinators: **Sohini Sengupta** in the UK and **Lindsay Nasshorn** in the US.

Perfect Software has added two apprentices to its growing team. Luke Jones and Francis Loweth are both students at Bridgend



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College, Wales, which is close to Perfect Software's headquarters.

Phoenix Business Solutions has added several new members to its North American global support team. Michelle Balk joins from Adaptive Solutions, Mubasher Ahmed joins in Toronto, and Scott Underwood has more than a decade of legal industry experience at vendors including iManage, Traveling Coaches and Microsystems.

TCDI has hired former Ogletree Deakins director of litigation support **Sean Reddick** as a senior vice president. At Ogletree, Reddick assisted lawyers and clients to develop and implement internal and external solutions for effectively managing large document and ediscovery projects, a role he will continue at TCDI.

CPA Global is accelerating its growth in China with the opening of a Beijing office headed by general manager **Yifeng Song**. Song was previously with China-based private equity company PL Capital and before that with Thomson Reuters China in a series of management roles.

PEOPLE & PLACES CONTINUE ON PAGE 11



PEOPLE & PLACES CONTINUED FROM PAGE 10

Innovative Computing Systems (ICS) has hired Foxtech Corporation account executive Jimmy Weaver. Weaver, who has also worked for Dell as account executive, sales manager and channel reseller, will be based in the ICS Texas office.

Catalyst Repository Systems just announced that Thomas Gricks, who specialises in technology assisted review (TAR) in litigation, has joined Catalyst as managing director of professional services. Gricks is a former partner and chair of the eDiscovery group at Schnader Harrison Segal & Lewis, with 25 years' experience as a trial lawyer and inhouse counsel. Gricks is also a member of the Sedona Conference Working Group on Best Practices for Electronic Document Retention and Production.

Congratulations to Eclipse Legal Systems which recently won the *Job Creator of the Year Award* category at this year's *Telegraph and Argus Bradford Means Business Awards*. Founded in 1987, Eclipse now employs over 160 staff and has recruited 80 new staff since 2013, including 10 new roles since the start of 2015.

Atom Content Marketing, the company behind the Law Donut website, has moved to new offices at CityPoint, Temple Gate, Bristol BS1 6PL. The new phone number is: 0117 373 6160.

Quill Pinpoint has begun a recruitment campaign that will increase the company's workforce by 10% overall. Based almost exclusively at its Manchester offices, vacancies currently available include four trainee legal cashiers, trainee administration and accounts assistant, trainee software tester and software developer. www.quill.co.uk/recruitment

Congratulations are also due to **Doug Smith**, the DM & Interaction Manager at **Reynolds Porter Chamberlain (RPC)**, who has just won an Apple Watch in a prize draw organised by data storage specialists **Nimble Storage** at the recent **Inside Legal IT** tradeshow in London.

Troy Boyer has joined Oklahoma-based ediscovery and digital forensics specialists Avansic as an account executive with responsibility for the Texas, Missouri, and Colorado markets. Along with over 10 years' experience in the sector, he has actually performed ediscovery processing himself.

Everlaw, recently named by **Gartner** as a "Vendor to Watch" in its *Ediscovery Magic* Quadrant, has recruited **Alex Liu**, a fluent Mandarin speaker, as marketing coordinator, along

with **Mondee Lu**, who joins Everlaw as sales development associate, **Serena Gupta** as a software development intern, and **Clay Miller**, as operations engineer helping with ediscovery data processing and customer care.

Clay, incidentally, also plays competitive ultimate frisbee at international club level. Everlaw marketing consultant **Anastasiya Levin** told the Insider the company is heavily into frisbee. "Our CEO, senior director of accounts, operations manager, and operations engineer all play ultimate frisbee on national teams. One of their teams won the world championship in Italy last year, and the other one took second place. It's one of the ways that our CEO recruited early employees!"

Finally, it's the end of an era as our long-time advertising manager **Philip Woolley** has left Tavistock Media to take up a new role in the electronics trade press sector. Woolley looked after the Insider's newsletter and website advertising for the past five years and was also involved with this year's **Inside Legal IT** event. He will be missed and we wish him every success and in his new role.



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Talking Tech is back



We've been busy producing videos for our *Charles Christian Talking Tech* series and have seven new episodes available:

- Patrick Hurley of Thomson Reuters Elite on business and customer development
- James Moeskops of Millnet introducing two new products DocBuster and MedBrief
- Jan Van Hoecke of RAVN Systems on their move into Artificial Intelligence (Al) for Lawyers
- Ben Jennings & David Jones of BigHand talking about the company's move into the wider document production market and Smart Notes
- A panel session on *Business Transformation* through eBilling comparing and contrasting the US & UK experiences with GC consultant **Julia**

Chain plus **Martin English** & **Rob Gitel** of **Thomson Reuters Serengeti**

- Northern Ireland barrister-turned entrepreneur **Orlagh McGahan** on the new **Briefed** service
- Mark Craddock of NetDocuments on how cloud-based DMS can address the security and risk management issues concerning law firm clients

Still to come next week are interviews with Liam Flanagan of Enable plc plus Caroline Hill talking to Chris White of Clyde & Co.

You can find links to all the videos in our Talking Tech series here http://www.legaltechnology.com/category/latest-news/talking-tech/

10 years ago today

Some things never change. In two weeks' time Microsoft ends Windows 2003 support and is still fretting about getting users of Windows XP over to a more modern platform. Back in the summer of 2005, Microsoft was poised to end-of-life Windows 2000 yet still had it running on 48% of desktops, with only 38% of users on the then state-of-the-art XP. Oh, yes, and there were 14% of sites still running Windows 98 and the even more ancient Windows 95. Coincidentally, today 14% of Windows users are still running XP.

Elsewhere there was jubilation among UK legal software vendors at the news that supersalesman David Thorpe had quit Thomson Elite (as it then was) after 10 years to join Tikit. He didn't stay there very long and after stints with Pilgrim and Aderant, is now with Peppermint Technology.

Peppermint's system is based on Microsoft technology, as was Exemplar, launched by Intervolve in 2005 as a Microsoft Great Plains based PMS, after being developed inhouse by the law firm Battens. Unlike Peppermint, Exemplar failed to take off. OK, some things do change.

legalii insider

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