Finers to roll out DDS on practice-wide basis

Finers Stephens Innocent is to roll out BigHand’s TotalSpeech digital dictation workflow management system to 122 users across the firm, following the completion of a pilot project in the firm’s property department. The firm’s IT manager Nick Boarland said the pilot, which began in November last year, was “a 100% success”.

ABC develops 2007 strategy with BRCO

Addleshaw Booth & Co, currently involved in merger talks with Theodore Goddard, has used Baker Robbins & Co to assist with a strategic review of its technology and information systems vision for 2007. The firm’s IT director Damian Griffiths said the review had “been very successful in matching our technology planning with our business strategy.” Addleshaw’s IT strategy committee has now agreed a plan for the next 3-to-5 years, which will exploit new technologies, as well as take advantage of existing investments in IT. See also page 8.

The Insider web site

For the top legal technology news, jobs, links and information resources - visit the award winning Legal Technology Insider web site. www.legaltechnology.com

Big names move into records management

Hummingbird has acquired LegalKEY Technologies, a New York-based software company best known for its electronic records management and conflicts of interest checking systems. With effective records management, including corporate document retention policies, now high on the agenda for law firms in the wake of Enron and similar scandals, there has been a suggestion that in an ideal world, the best possible approach is a combination of a conventional document management system linked to a records management system that, like LegalKEY, could handle both paper and electronic files. Hummingbird will now be able to deliver this integrated solution from one source.

LegalKEY will function as a subsidiary of Hummingbird and continue to serve its existing clientele - UK users include Clifford Chance, Norton Rose and Mayer Brown Rowe & Maw. The executive management of LegalKEY will also remain in charge of the LegalKEY operation, while for LegalKEY customers running the rival iManage DMS, Hummingbird will offer a free migration package from iManage to Hummingbird DM5.

Commenting on the deal, Hummingbird UK country manager Liz Maloney described the move as part of a broader strategy to provide complete life cycle management of documents, knowledge repositories, digital and paper records, and client and matter information. At the time of going to press Hummingbird and LegalKEY’s existing UK distributor Kramer Lee & Associates had not yet met to discuss the future of their relationship - a previous relationship between KLA and Hummingbird unravelled acrimoniously in June 2000.

Just like London buses, there is never a records management system around when you want one and then two come along at once, the second being MDY Advanced Technologies’ FileSurf software which, with LegalKEY, currently dominates the US market. MDY, which opened its London-based European operations earlier this year, last week announced a mutually exclusive partnership that will see Tikit sell and support FileSurf in the UK legal market. MDY is a strategic partner of iManage however FileSurf is also compatible with Hummingbird, thereby providing an immediate synergy with all Tikit’s DMS clients.

MDY European director Ron Christian said the design philosophy was that the medium should be irrelevant and the key concern was providing a technology platform that could support an organisation’s document retention policy. To this end FileSurf can handle physical and electronic records management, email management via integration with Outlook/Exchange, Lotus Notes or GroupWise, web content management and, along with document management software, can also be integrated with case and practice management systems. In common with LegalKEY, FileSurf can be supplied with a number of ready to run modules, including conflict of interest checking. As to the prospects for records management systems, Christian is convinced “the legal market is ripe” for this kind of software.
Database specialists team up with Interface

Shamrock Marketing (01494 834480) has joined Interface Software’s partner programme and will now offer its marketing data management services to users of the InterAction client relationship management system in the UK. Shamrock say the deal will help firms achieve the maximum return on investment from their CRM systems.

Founded in 1989, Shamrock’s portfolio of services includes data auditing, data cleaning, data research & development and fulfilment services. Or, as Davies Arnold Cooper marketing director Rachel Penfound put it “We appointed Shamrock because of their passion for data quality combined with a real understanding of how to overcome the data management challenges posed by people, process and embedding new technology.” Other Shamrock law firm customers include Weil Gotshal & Manges, Denton Wilde Sapte, Freshfields, Allen & Overy and Berwin Leighton Paisner.

www.shamrock-marketing.co.uk

Ugly rumours feed some very real concerns

Spring is in the air and so are the ugly rumours. One of the more prevalent is that recent exploratory talks between two legal software vendors collapsed at an early stage because of ‘cultural differences’ - apparently a euphemism for the fact the two managing directors cannot stand the sight of each other.

We are also hearing reports that a US-based litigation support services company may be about to acquire one of its UK rivals and has been holding talks with the company’s parent group. And, the word is one magic circle firm is, implausibly, considering throwing out its relatively new accounts system, while another top 100 firm’s legacy PMS upgrade project is up for grabs, with some rival vendors so keen to win the order - or at least the PR kudos they hope will accompany the deal - that they are offering to supply their software free of charge.

COMMENT: In fact there is a serious side to these rumours as they reflect growing concerns within the industry that there are just too many suppliers chasing after too little business. Consider the maths: There are over 35 (and growing - seeTy-com story) suppliers of legal accounts software in the UK alone but only 2600 law firms with more than 6 fee earners.

If these practices operate a seven year replacement cycle (and there are plenty of firms working on much longer intervals between upgrades) then in the course of the average year there are probably less than 350 sites of any size coming up for renewal. This is not a lot of pie to feed so many hungry mouths, particularly as many of these firms do not even go out to competitive tender but merely stick with their existing suppliers.

In the circumstances, it is hardly surprising some vendors are prepared to cut their own throats (although the accompanying annual maintenance revenue is an attractive prize) in an attempt to land high profile competitive wins or swap-outs. Likewise, if mergers and takeovers are the way ahead, so the pressure will increase on suppliers (and their investors) to find suitable marriage partners or else risk being left on the shelf with a portfolio of legacy systems and a declining user base.

News in brief

■ CONVEYANCERS AUTOMATE
Norwich-based David Meddick & Co, which is headed by David Meddick, the current chairman of the Council for Licensed Conveyancers, has selected the ProCLAIM conveyancing case management system from Eclipse Legal Systems (01274 704100) to improve client service and speed up the house buying process. Along with all the usual features of case management, the ProCLAIM system also supports SMS text messaging, NLIS searches and online case progress reporting to referrers such as LMS (Legal Marketing Services).

■ SELECT LAUNCH PI TAG KILLER
Select Legal Systems (01482 644334) has developed what it describes as a killer application for law firms handling personal injury case management claims work for The Accident Group (TAG). The system, which was developed in conjunction with Leeds solicitors Levi & Co, handles all the legal protocols, letters and documents associated with TAG workloads.

Freshfields’ move highlights email priorities

Freshfields Bruckhaus Deringer has announced plans to trial the new iManage email management system when it starts shipping next month. Freshfields has already begun rolling out iManage’s core document management system - the firm announced its migration from FileNet last May - however the latest announcement reveals just how seriously major law firms now view the problem of email management. Or, as one source put it “this is the first time I have ever heard of anyone announcing their commitment to a product before it had been formally ordered by the firm or even been fully released by the vendor.”
Major corporates to standardise on HotDocs?

Marshall Morrise, head of software design for the HotDocs document assembly and automation system, was in London earlier this month to brief major HotDocs users, including members of the HotDocs law firms user group, on the latest developments.

This included news that the first organisation to commit to a global roll out of the latest HotDocs 6 system will be GE, one of the largest companies on the planet. The news prompted speculation that GE is going to insist that in future the law firms it instructs use HotDocs for all document preparation. Similar rumours surround one of the UK’s high street banking chains.

- In a related development, the Insider has learned that Capsoft UK, the major supplier of Capsoft outside the US, has renegotiated its distribution agreement with the Lexis/Reed Elsevier group and that it will now run “beyond the year 2010”.

Ty-com moves into Scottish legal systems market

Aberdeen based Ty-com Business Systems (01224 321545) has expanded its operations within the Scottish legal IT market through a transfer of hardware support contracts from Pilgrim Systems. To ensure a continuity of service to existing law firm customers Ty-com has also recruited four ex-Pilgrim sales and technical support staff: Alan Findlay, Brian Falconer, Sue Clark and Mike Smith, as sales manager.

In a related development, Ty-com has entered into a joint venture with Pace Professional Systems in Edinburgh to sell and support that company’s PacePro practice management software to sole practitioners and smaller solicitors practices. Keeping with the Pilgrim connection, Pace Professional was formed by Ronnie Paton and Derek Bruce this time last year after their departure from Pilgrim. As part of the departure deal, Paton and Bruce took over the small firms systems development project (code named LawPro) they had been working on at Pilgrim. This forms the basis of their new PacePro software which is now in use or being installed at eight Scottish firms.

As a result of these developments Ty-com, which is probably best known for its IT work in the oil, gas and construction industries, now has over 60 law firm customers.

www.tycom.co.uk
www.paceprosystems.com

Some pain, a lot of gain - in a good cause

Congratulations to five members of Solicitors Own Software who last week raised over £3000 for various charities after taking part in the Bath Half Marathon. Ken Gaines, Dan Mitchell, Mark Western, Graham Colbourne and Sophie Francis all completed the course, recording times ranging from under 2 hours to 2 hours 50 minutes. Sophie Francis also deserves a special mention for raising a massive £1850 for her good cause.

News in brief

- TIMESLICE OUSTS PILGRIM
  Niche City media and IP practice GSC Solicitors has chosen the Lawman case and practice management system from Timeslice (020 7231 0073) to replace its incumbent Pilgrim software.

- ELITE APEX GETS PALM LINK
  Users of Elite’s Apex CRM software will soon be able to access contact management information via Palm handheld PDA devices. Elite launched the link - the Apex Connector - at a legal marketing conference last week. The system is available for immediate delivery, as is a similar connector for users needing to synchronise contact data between Apex and Microsoft Outlook.

Looking for IT staff?

Looking for legal IT staff, including positions in sales, development, web services, knowledge, support and training? Then post your vacancies free of charge to the Jobs Board on the Insider web site by emailing the details to jobs@legaltechnology.com

- This week we have a record number of new vacancies including development, sales and training positions at Timeslice, AIM, Datashare and Eclipse plus support, programming and case management development posts at law firms on the South Coast, in London and Liverpool. Salaries on offer range from £24k to £68k. For details of these and other vacancies visit the Insider Jobs Board at www.legaltechnology.com

New downloads on Insider web

Two more white papers - one on AMS Law’s use of AIM software and one on MDY’s FileSurf system - can now be downloaded free of charge from the Insider web site.

www.legaltechnology.com/casestudies.htm
### Eastern promise

Newcastle-based legal systems developer Griersons (0191 215 0075) is working with Smart Act Software of Beijing to market a Chinese language version of its legal accounts and file management software to lawyers and government departments in the People’s Republic of China.

www.griersons.com

### People & Places

- **NEW EAST ANGLIAN SUPPLIER**
  Wildings Professional Systems (01473 219819) is hoping to fill the gap that has existed in the local East Anglian legal IT market since the demise of Saxon Computer Systems. The Ipswich-based company can offer full hardware, comms and network support services, as well as legal accounts and case management applications software from Opsis and Quill.  
  www.wildings.com

- **EPOQ HITS HIGH STREET**
  The Epoq Group of companies, which includes Epoch Software, Desktop Lawyer and LawAssure Services, has moved to new premises at Grosvenor House, 1 High Street, Edgware, Middx HA8 7TA. The main switchboard number is 020 8731 2424.

- **GOWER MOVES TO ECLIPSE**
  Darren Gower has left Vides and joined Eclipse Legal Systems (01274 704100) as the company’s new marketing manager.

- **VRisko HAS NEW HOME**
  KM and independent search specialist Vrisko Limited has moved to new offices at 9th Floor, St Alphage House, 2 Fore Street London EC2Y 5DA. The new phone number is 020 7448 9714.

### Keep up with the news

Keep up with the latest news between issues of the Insider by subscribing to our free ezine the Legal Technology Insider Newswire. It is delivered direct to your desktop as a plain text email. To be added to the distribution list, send a note of your email address, including the word ‘News’ in the header, to news@legaltechnology.com

### E-conveyancing to go ahead despite concerns

Following an extensive consultation exercise, HM Land Registry last week published a report on the reception its plans for an e-conveyancing framework had received from members of the legal and property professions.

Welcoming the publication of the report, Baroness Scotland, a junior minister at the Lord Chancellor’s Department, said it “signalled strong support for the proposals.” She also confirmed that HMLR would continue to lead the development of the e-conveyancing project for England and Wales. The next stage will be discussions with potential IT and service suppliers followed by the presentation of a report outlining the final design of the system to LCD ministers later this autumn. This will subsequently be followed by the instigation of a procurement process expected to last a further 18 months.

It is however worth noting that despite the relatively enthusiastic response the proposals received - over 80% of respondents said they could not suggest a better approach - widespread fears and concerns were expressed about the reliability and security of the new system, particularly relating to the use of digital signatures. Predictably, smaller firms were also concerned about the potential costs and upheaval associated with implementing any new IT system. And, over two-thirds of respondents said they would prefer a phased approach, with the new e-conveyancing system running in tandem with traditional methods for a period of time rather than going for a ‘big bang’.

- A PDF version of the full report can be found on the HMLR web site.

www.landregistry.gov.uk/e-conveyancing

### News in brief

- **NEW LEGAL SCANNING SERVICE LAUNCHED**
  SolScan (01372 207040) has launched a new document scanning service for solicitors. The service includes taking a firm’s paper files, scanning them into an electronic format and arranging for the secure destruction of the originals. SolScan also provides consultancy and scanner hire/sales for firms wanting to set up their own in-house scanning facilities, either as part of a case management system for current matters or to convert archived files and records in digitised format. For a free trial scan of a sample file contact Andrew Lutley or Rory Gilbert at SolScan.

www.solscan.com

- **LDM TO USE MERRILL’S E-DISCOVERY SYSTEM**
  Litigation support specialists LDM (020 7613 1160) has just announced that it will be using the US Merrill Corporation’s e-Capture electronic discovery and disclosure system as the basis for a new e-discovery service it will be offering its UK law firm and corporate customers. e-Capture can help translate electronic data, including email messages, into metadata, OCR text and images so it can be stored on a database for searching.

www.solscan.com
**Tikit results show evolving business**

The AIM listed Tikit Group last week released its preliminary results for the year to 31 December 2002. Given the difficult trading conditions in the legal IT sector last year - particularly at the top end of the market among the larger firms where Tikit has its main customer base - the company did well to see its turnover fall by only £900k from £9.12 million to £8.23 million. Inevitably net pre-tax profits were also down - from £1.07 million to £648k - although the company’s gross profits were little changed on the previous year. It is also worth noting the figures take into account internal software R&D and the acquisition of another new business - the KM consultancy Granite & Comfrey. Although understandably cautious given the continuing general economic uncertainty and the Iraq war, in common with a number of legal IT companies, Tikit chairman Mike McGoun reports a positive start to the 2003 trading year.

To the outside observer, possibly the most interesting development is the way Tikit has managed to evolve over the past 12 months from being primarily a software distributor and systems integrator into a broader based IT services and consultancy business. Consultancy work and services (either undertaken directly or via its Aurra Consulting and Granite & Comfrey arms) now account for over 53% of Tikit’s revenues (compared with about 30% last year) with pure consultancy fees up by 7.5% to £2.4 million. With many firms revisiting their knowledge management projects this year, Tikit’s evolution into a broader based consultancy looks to be a smart move.

**Summation planning major push into UK litigation support field**

Despite being the runaway market leader in the US litigation support systems field, the names of Summation and its iBlaze software range are still relatively unknown in the UK.

One reason is that to-date Summation has only been offered, with varying degrees of enthusiasm, through distributors or litigation support bureaux however this could be about to change. As a result of a joint venture between RNM Systems in London and Adeo Legal Technology in Dublin, Adeo Legal Technology UK (020 8293 6869) has opened for business as the authorised reseller and support provider for the Summation line of products in the UK.

The Adeo UK team is headed by Paul Statham and Anne Dunne, with Philip Briffa heading technical support and Cecilia Nielsen in business development. In addition, litigation support consultant and long-time Summation user and trainer Michael Conde is also working with Adeo. Adeo held their first seminar to launch the relationship with Summation yesterday and will be involved with further events throughout the year including the LawNet litigation support session at the LegalTech Solicitors conference in Birmingham in May. www.adeolegaltech.com

**Events news - Lex Connects in Amsterdam**

The Ark Group looks as if it may have cracked the European legal IT events market, if the reports coming in from the Lex Connect conference, it ran in Amsterdam earlier this month, are anything to go by.

The event, which was attended by about 60 delegates followed the networking model of matching vendor solution providers with senior European lawyers in a conference environment. Hot topics were document management, portal technology, risk management and knowledge management.

As one delegate put it “Conspicuous by their absence, IT directors with limited budgets had been replaced by managing partners with strategic visions for their organisations.” Or, as Derek Southall - the head of strategic development at Wragge & Co and one of the speakers - commented “The attendees were very European and for the first time ever I detected a real appetite for buying IT and putting key systems in place from the European firms. Overall it was reasonably good and it helps to be reminded of the UK’s place in the worldwide global IT market.”

Ark Group publisher Henry Anson added “Lex Connect succeeded in aligning technology and strategy in a programme that attracted an audience of managing partners from across Europe. This has rarely happened in the past as law firm managers have treated IT as a separate entity to management decision making. Times are changing however and Lex Connect found a way to bring together solution providers and decision makers with real budgets.”

■ Ark will hold Lex Connect again next year, on 1 & 2 March 2004 in Amsterdam.

**Autumn IT dates clash**

In a spectacular example of bad planning, although no-one is accepting responsibility for this lack of co-ordination, the dates for two of the leading events in the UK legal tech events calendar - the Legal IT Leeds exhibition and the ‘GlenLegal’ Legal IT Forum - will clash this year. The Leeds show will take place on 15 & 16 October, while Gleneagles is scheduled for 15-to-17 October.
In recent issues we have carried a number of reports indicating that law firms have still not fully grasped the concept of marketing and that major investments in client relationship management (CRM) software are not going to help them if they do not have the basics in place.

These concerns have now been further highlighted by the results of a new survey, conducted earlier this month exclusively for the Insider by Performance House, a specialist consultancy that carries out benchmarking studies and advises organisations on improving the way they communicate with their clients and prospects over a range of channels, including call centres, switchboards and voicemail. Using a ‘mystery shopper’ approach, Performance House called the switchboards of 15 national/major regional law firms to evaluate their response to requests for information from callers, primarily posing as potential small business clients.

The survey found the quality of call handling and knowledge of the firms’ internal structures showed marked inconsistencies between firms, resulting in a variance of 30% between the best performing legal switchboard (Bond Pearce on 88.9%) and the worst (with a 58.9% score). Performance House say this “gulf” is interesting as in most business sectors, the standard of service is broadly consistent. Bevan Ashford, Dickinson Dees, Eversheds, Irwin Mitchell, Osborne Clarke and Wragge & Co (listed in alphabetical order) also achieved high scores.

Performance House found some switchboards were particularly unwelcoming, interrupting the caller mid-sentence to ask if they were an existing client, and on one occasion, when posing as a law student looking for information, the operator interrupted saying “We don’t speak to the general public.”

Another issue the survey highlighted was the lack of knowledge of the staff at the first point of contact, with 21% of calls initially transferred to the incorrect individual. Performance House call this a ‘blind transfer’ where a switchboard transfers calls initially transferred to the incorrect individual. Performance House also found that having the correct knowledge of the staff at the first point of contact was particularly crucial to the success of the call, with 68% of callers being transferred to the correct person on the second attempt.

The survey also found that only 28% of switchboards explained or introduced the caller to the extension user. This resulted in callers having to explain their situation and details again. On two occasions after the caller explained their scenario to the extension user the caller was asked “Why have they put you through to me?” Performance House say this indicates incorrect transfers are common practice and suggest that introducing the caller prior to the transfer...Continued on page 7.
Phone manners - CRM begins at the switchboard

Continued from page 6... could greatly reduce the number of incorrect transfers, as it would allow the extension to explain if they could not help and to suggest another option.

Although the aim of the exercise was for callers to receive practical information over the phone within one call to the firm, this was rarely achieved. Most callers were offered call backs with some firms stating a caller must be assigned a solicitor prior to any information being offered.

Overall, the survey found that less than 33% of the calls resulted in the query being resolved the first time although at the extension level both Bevan Ashford and Dickinson Dees were singled out by Performance House as “high performers offering knowledgeable and practical advice in all the calls which targeted their firms... this is commendable.”

Rather more worryingly, although the mystery shopper callers were frequently offered a call back, email from someone who could assist or even information posted out to them, only 38% of these promises to supply further information by phone, email or post were actually fulfilled.

In other words, 62% of potential new clients never received the information or service they were promised. Had they been real prospects, this treatment could not fail to unimpress. It is however some consolation to hear from Performance House that when callers did receive a call back “the quality and knowledge of the individual was particularly high” and all offered their contact details to the caller should any further advice be needed.

Plenty of food for thought, not least because eight of the 15 firms featured in the survey currently run CRM systems. These include the two poorest performers but not the best performer Bond Pearce. Perhaps firms are substituting CRM software for the implementation of true CRM policies? Or, as Derek Southall, the head of strategic development at Wragge & Co, put it “The quality of law firms switchboards is absolutely key. In so many ways they really are at the heart of our businesses.”

For more information on switchboard performance and client to business communication benchmarking contact Rob Dunphy at Performance House on 01768 866050. www.performance-house.com

All change for Insider advertising

As part of a series of planned enhancements to the Legal Technology Insider group of publications, as from this issue all advertising enquiries should be directed to either Jeremy Hill or Karen Jones at PS Publications - see back page for details.

This new outsourcing arrangement is to meet a growing demand and will also mean advertisers can be offered a far wider range of promotional opportunities than has previously been possible. There is however no change to the editorial board, policy or ownership of the Insider which continues to be an independent, subscription only newsletter.

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Cognito - back on track consolidating business

After some difficult times, including failed three-way merger negotiations and a parent company entering into a CVA (creditors voluntary agreement) Cognito Software (01279 821230) is confident its policy of focussing on consolidating its existing user base has not only paid dividends but now puts it in a stronger position to start winning new customers.

Cognito business development director Zahid Hamid admits the company’s low profile - it stopped attending legal IT trade shows some years ago - means the market is probably unaware of some of the developments to have taken place in recent times.

These include the fact its parent company Ultima came out of CVA just under a year ago in May 2002 when the privately owned Akhter Group, which has a 49% shareholding in Ultima, made a £2 million cash injection and restructured the business.

Rather more importantly, the Cognito accounts software can now be supplied with an integrated case management system. This includes modules for conveyancing, matrimonial, debt collection, criminal and personal injury work. There is also a marketing module, which should appeal to any firm wanting to manage its promotional campaigns but needing something more sophisticated than database mail merge facilities, and an employment module will be available from June.

Cognito also continues to enhance its Custodiens trust and probate accounts software both as a package product and as a bespoke system - recent orders include a project for Martineau Johnson. Hamid reckons this willingness to undertake bespoke development projects - “we are a facilitator rather than just another software supplier,” he says - is one of the factors that has helped Cognito not only retain its existing user base but also attract a steady flow of new business - its most recent win being Neves, a 60-user former SOS site in Luton.

Another system for dealing with metadata

In the latest instalment of our informal series on metadata management tools, one of our US subscribers has drawn our attention to what they describe as “one of the best products on the market,” namely the iScrub system from Esquire Innovations Inc.

The latest release of iScrub (version 3) provides integration with both Outlook and GroupWise; can remove metadata from Word, Excel and PowerPoint files; has a batch processing utility; and has a feature called Metasealant that effectively locks a document from being edited or copied to create a read only file.

There is also a metadata viewer utility that gives users a one-click way to display all the metadata associated with a particular document. This is available both as an integral part of iScrub and as a free download called iDiscover however it only works with Word 2000 and XP files.

California-based Esquire, who also produce the iCreate macro/document assembly system and will soon be launching a new version of their iRedline document comparison tool, are currently looking for development and reseller partners.

Consultancies - Baker Robbins and Hildebrandt ally

Two of the legal world’s better known consultancies - Hildebrandt International and Baker Robbins & Co - have announced a ‘strategic partnership’ to deliver a broader range of services to their clients.

Commenting on the move, Brad Hildebrandt said that since there was a technology component and impact in almost every management consultancy project they undertook for law firms, particularly work relating to mergers, “we realised the benefits our clients would receive if we were able to offer them more comprehensive technology advice and services” by working with an IT-led consultancy such as Baker Robbins.

Although this is a global alliance, which in the UK will see Andrew Levison’s team at Baker Robbins working with Alan Hodgart at Hildebrandt, both sides are keen to stress there is no hidden agenda and that this is not a precursor to merger.