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Calm before the Legal Services Act storm

With the English legal market in a strange state of hiatus, with parts of the *Legal Services Act* (LSA) now in force but the bits everybody was getting excited about – the start of the issuing ABS (alternative business structure) licences – delayed until January or February 2012, speculation is mounting as to what will happen next.

At this month's *Legal IT Forum*, the consultant Neil Cameron led an interesting panel session which concluded that private equity and venture capital groups were unlikely to invest directly in law firms, because they are essentially ephemeral people businesses, and were therefore more likely to invest in companies servicing the legal world, such as legal process outsourcers.

The panel also expressed the opinion that as most VC investments are made with a view to an exit strategy via an IPO, the more attractive option for firms would be to cut out the VC middle-men and go straight for an IPO. Irwin Mitchell is expected to be the first UK law firm to seek a stock market flotation – two firms in Australia have already gone down this route with considerable success and rising share prices.

As to what law firms might do with the proceeds of an IPO, the most likely outcome is they will use it as a war-chest to fund a major expansion into the US legal market space. American law firms be warned, the British are coming and they mean business. ➡

➡ We've also received a report from Access UK. Called *The future of technology: transforming mid-market business operations*, its authors reckon one of the most important consequences of the LSA is that it will shift the IT focus of law firms towards collaborative systems, workflow, resource planning and HR technology. With regards to the final point on HR, Access say firms face a double whammy of managing the talent of an ageing workforce, as the retirement age extends, while at the same time coping with an influx of Generation X and Y 'digital natives' into the workplace.

www.theaccessgroup.com

Finally, Peppermint Technology has published the results of a survey it conducted into what clients really want from their legal service providers. Some of the key factors to emerge from the report include...

- **Know Your Clients:** There is still a disconnect between what law firms offer because they think that is what their clients want – and what their clients really want. Firms need to devote more effort to understanding their clients' needs and aspirations. They also need to appreciate their private clients may have a markedly different set of priorities to their corporate clients.

- **Clicks & Data not Bricks & Mortar:** One aspect that leaps out of the survey findings is that clients of all types care very little about the physical location of law firm offices. As the survey also highlights the importance of technology across the entire legal services ...continued on back page ➡

Birthday Quiz

What do Michael Jackson's *You are not alone*, Microsoft Windows 95, eBay and the *Legal Technology Insider* newsletter all have in common? Answer: they were all born in 1995. Happy Birthday the Orange One – you can now have sex, get married, apply for a full-time job and buy a lottery ticket. Enjoy.



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CRM vendors clamour to claim “I am Spartacus”

Our recent coverage of client relationship management systems has generated one of those *I am Spartacus! No I am Spartacus!* moments with vendors clamouring to claim their products represent the future of CRM software. So, here is our latest despatch from the marketing software trenches...

Despite its reputation for being the most expensive Christmas card mailing list management system on the planet (and there really are firms that only use it for this) **LexisNexis Interaction** remains the runaway CRM market leader. However we reported in May that among mid-tier firms, the three products most frequently reviewed as alternatives to InterAction were **Microsoft CRM Dynamics**, **Salesforce.com** and **Sugar CRM**.

Since then the Tikit Group has entered the fray with its own CRM system called **Tikit ClientConnect** and already secured its first win. We have also seen **Aderant** acquire Client Profiles and its **CRM4Legal** product. This is one of the most popular implementations of CRM Dynamics and we expect the Aderant deal to increase CRM4Legal's penetration of the legal market.

We also have Peppermint Technology with its CRM Dynamic-based **Peppermint Portal**. Then there is Converge IT's legal software division which launched its own inhouse developed **SmartLegal CRM** system earlier this summer, last we heard it was being piloted by a Quality Solicitors. And we should not forget the **Epona ContactManager CRM** system which is gaining traction among Benelux law firms.

That's nine CRM systems and there's still one more to go in the shape of the **Hubbard One Contact Manager Communicator** system, which also includes integrated email marketing. Hubbard One say they “are being told by law firms and third parties that they consider Hubbard One, along with Interaction and CRM Dynamics, as the three main contenders for a law firm CRM project” and “are now surprised if not shortlisted

with one or both of these competitive offerings for any significant tender.”

Globally, Hubbard One has over 50 large and mid-tier firms using the company's CRM products, as well as a further 70 plus law firms using the ContactNet enterprise relationship management tool. In the UK, 15 firms (including two in the top ten) are now running Hubbard One relationship management products, with only Interaction having a larger user base.

Vital statistics: 20 million

Congratulations to NLIS which this month celebrated its 20 millionth electronic conveyancing search. The actual 20 millionth search was conducted through the NLIS channel SearchFlow on behalf of Streeter Marshall solicitors in respect of a property in Banstead.



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October's wins, deals and rollouts

The **European Court of Human Rights (ECHR)** has selected **SkyDox**, a provider of cloud-enabled collaboration and productivity tools, to develop a new search engine platform for all ECHR legal ruling documentation hosted on its public-facing website. The new system will allow more than 4.6 million visitors a year (including up to 5000 simultaneous visitors following a major ruling) to access the site to search and retrieve an ever-expanding library of more than 90,000 ECHR judgment related documents in a more efficient and intuitive manner.

The new platform, built on the ECHR's existing HUDOC document database, will combine the search capabilities of Microsoft Sharepoint and FAST with the Web 2.0 technologies of SkyDox. Initially case judgments, and later press releases and other documents, will be available through the platform. ECHR head of IT John Hunter said "The project will greatly enhance the ECHR's capacity to distribute its case-law to as wide an audience as possible... and ensure the public can search for and access documents within seconds of being published."

www.skydox.com

Taylor Vinters has deployed **Bighand** for BlackBerry software on smartphones firm-wide as an alternative to using portable dictation hardware. The firm's IT director Steve Sumner said "Device convergence has rendered the firm's portable dictation devices obsolete. We used portable dictation hardware for a number of years, spending thousands of pounds annually to maintain a pool of devices. Like many firms looking for ways to streamline costs, we can no longer justify the high annual cost to buy and maintain single function dictation devices. Each portable device costs approximately £300 to purchase, this is roughly equivalent to five Bighand for BlackBerry licences."

Comment: We wonder if the manufacturers of portable dictation hardware – Philips, Grundig and Olympus – have woken up to this threat?

➡ **IBB Solicitors** in West London is the latest UK law firm to outsource its helpdesk services to **Intelliteach**. As well as managing the firm's day-to-day service desk operations, Intelliteach is providing 24/7 out-of-hours coverage and overflow support during major upgrades.

In addition to this month's deal in South Africa (see page 5) **Phoenix Business Solutions** has been selected by IP lawyers **Forresters** to supply and implement an HP Autonomy iManage DMS and associated Phoenix Workspace utilities. **Barclays Capital Legal** has also selected the Phoenix Workspace for iManage Worksite toolset.

Following a two month competitive trial, **Ward Hadaway** has signed up for the **Copitrak** suite of cost recovery (for copy and print), secure print and scan management systems. Working in conjunction with local MFD (multi-function device) specialists **United Carlton**, the Copitrak systems are being rolled out to offices in Newcastle, Leeds and Manchester.

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Jeff Wright, Partner and Information Technology Director, Morgan Cole LLP

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More wins and rollouts

Brighton-based **Howlett Clarke**, one of the founding law firms within the Quality Solicitors group, has implemented an **Eclipse Legal Systems** Proclaim accounts, case and practice management system in what is described as a 6-figure deal. Along with ordering Proclaim probate, personal injury, conveyancing, matrimonial and employment case management software, the firm will be tailoring the Proclaim Matter Management system for its landlord & tenant, company commercial and civil litigation teams. Eclipse is also handling the data conversion from the firm's legacy accounts system.

After an extensive selection process, Leeds firm **Shulmans LLP** has implemented the VoiP telephony solution **IPCortex** to replace its legacy Alcatel system. IT manager Ross MacIntyre said "We researched and spoke to many VoiP solutions providers but chose IPCortex because of their innovative and feature rich platform."

www.ipcortex.co.uk

Morgan Cole has selected **LANDesk Software** to help it improve productivity and save money on its IT service and support operations. Commenting on the deal, the firm's service delivery manager David Elms said "We were running numerous back-end systems requiring manual data entry. Operating systems, software and hardware updates were a nightmare, never mind coping with users' daily challenges. Every three years, we had to bring in external consultants to carry out a desktop refresh, at a cost of £75,000. This year, when that need came around again, we thought enough is enough and decided to invest in a solution that would not only facilitate all future refreshes (saving us £75,000 each time) but would also transform our day-to-day service desk operations."

After considering several options, including Symantec Altiris and Dell Case, Morgan Cole purchased LANDesk Management Suite, LANDesk Service Desk and LANDesk Cloud Services Appliance. Elms thinks the Cloud appliance "will be invaluable... we now have a solution that allows our mobile workers, who ➡

➡ make up a significant proportion of our workforce, to enjoy the same level of support as our office workers wherever they are, and gives us vital peace of mind in that we can monitor our IT equipment and assist if something goes wrong."
www.landesk.com

Ambitious shipping law niche practice **Campbell Johnson Clark** (the firm currently has five partners but expects to double or triple this number in the foreseeable future) has opted for SOS Connect from **Solicitors Own Software** to provide its case and practice management needs across multiple device types: desktop and laptop PCs, iPads and Blackberrys.

Founding partner Alistair Johnston admits that when the firm was established in 2010, software from another provider was implemented due to time constraints, despite a preference for SOS Connect. "Unfortunately this alternative failed to meet our expectations and within six months we decided to switch to SOS Connect."


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Right place, right time

Timing is everything and earlier this month Connect Communications held a presentation at the Law Society in London on unified communications in association with Avaya. On the agenda was fixed-to-mobile telephony convergence, a hot topic as the event coincided with the recent Blackberry service outage (aka the *Great Blackberry Crumble*). Avaya, by contrast, can provide an internal telephone system-to-Blackberry integration solution that is not reliant on RIM's proprietary servers, which were at the heart of the outage.

The event also looked at Avaya's Flare system for iPads, its new Android-based video conferencing system and its ACE time capture and billing application that integrates with telephony.

www.connectcs.com

EMEA news round-up

More SA success for Phoenix Johannesburg law firm Fluxmans has chosen Phoenix Business Solutions to supply and implement its new HP Autonomy iManage document and email management system. The order is Phoenix's sixth deal in South Africa.

Knowledge engineering in Sweden We caught up with Helena Hallgarn, one of the co-founders of the Swedish-based consultancy VQ, at the recent *Legal IT Forum* event and asked her about her company's new VQ Legal intelligent document assembly service. This is what she said "VQ Legal provides a new intelligent and efficient solution for creating all relevant documents for a specific legal matter, such as a share issue, with content that is updated and quality assured. It is a cloud service, reachable from any computer with internet access, with document collections available to purchase on demand and customers not bound by any ongoing licence costs or monthly subscription fees. Customers use a web interface to answer questions regarding the ➔

➔ specific matter and, based on these responses, VQ Legal automatically generates the appropriate documents.

"The difference between VQ Legal and other template document providers is the intelligent assembly of the document and the ability to create multiple documents with information entered just once by the lawyers. The solution can be integrated and accessed directly from a law firm or legal department's internal systems and the documents can also be edited to have the same look and feel as documents produced internally."

The founders of VQ, Helena Hallgarn and Ann Björk (two of the most experienced knowledge management professionals in Scandinavia) developed VQ Legal to support legal advisers streamlining their work to meet new legal business models and client demands for increased efficiency and more value for money.

www.vqlegal.se



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Fresh on the Radar

Video killed the conference call? If we had £10 for every videoconferencing technology vendor who has told us over the past 15 years that their system would become *The Next Big Thing* in legal IT, we'd be wealthy. Unfortunately, despite the obvious merits of videoconferencing as an alternative to face-to-face meetings when a phone call won't do, the technology has never achieved the traction it should have enjoyed.

Cynics would say this is because the vendors were too short-sighted (that's putting it politely) to appreciate that as long as they kept their prices sky-high, firms would not buy the technology in sufficient volume for it to gain any critical mass as an external communications channel. On the other hand, videoconferencing has gained a niche for itself as an internal communications channel, providing firms with a way of conducting virtual meetings with colleagues in other offices. Enter Edinburgh-based videoconferencing specialists NAC Networkz Ltd, who are a reseller and partner of the US videoconferencing software developer Vidyo Inc.

Vidyo's software uses scalable video coding (SVC) technology that permits HD high definition, multipoint videoconferencing to be conducted across the internet and general purpose IP/data networks, even where only low bandwidth is available. It is compatible with other manufacturers' 'room' systems, so it can be run in conjunction with legacy videoconferencing hardware. And it supports a wide range of devices, including desktop and laptop PCs, iPads and other tablets, and even 3G smartphones.

Vidyo describe their software as 'disruptive technology' in that it makes traditional videoconference systems look obsolete. This may be stretching things a little but the company is being seen as an alternative to Cisco in this sector and its software is used by Google in its Gmail ➔

➔ video and phone call services.

Closer to home, NAC has been enjoying success with some of the largest Scottish law firms, including Harper MacLeod, Brodies and Shepherd & Wedderburn. The latter two firms are now using Vidyo to extend videoconferencing beyond their board and meeting rooms, so staff can now work in an environment where they can communicate whenever and wherever they wish, regardless of network conditions, via desktop, laptop, iPad and iPhone.

www.naces.co.uk

www.vidyo.com

Cogenda on the agenda Next up we have another new face to us although the company – Richmond, Surrey-based Cogenda – has been operating in the debt collection market since 2001. Based on the company's experiences in this sector, in August it launched an integrated collection and litigation case management application called CogendaWorks.

Managing director Paul Husband believes the system will appeal to credit managers, debt purchasers, debt collection agencies, call centres and solicitors practices, who will appreciate the software's core campaign management tool that allows users to create campaigns and multi-level workflow strategies based on any set of user defined criteria.

Husband says the system has been designed to work out-of-the-box so it can be installed in a few hours and in use from day one.

This month Cogenda also added a Communications Manager module to the product mix, which allows users to build multi-level letter, email, telephone, text and fax campaigns, to help increase contact rates and improve the quality of contact data. CogendaWorks Communications Manager has an integral document production facility, as well reporting tools to track the responses rates for campaign management.

www.cogendaworks.com

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Tikit focussing on document middle-ground

Although they hate being reminded of this fact, the truth is most law firms (even the big commercial ones) are little more than giant legal document production factories. For this reason, one of the key areas in their workflow processes is that middle-ground between the initial creation of the document in Microsoft Word and its ultimate storage and archiving in a DMS.

This middle-ground, the document production phase, is increasingly where all the action takes place as documents are revised and amended and shuttled back and forth between law firms and inhouse counsel. It is this phase where technologies such as collaboration tools, redlining, track-changes, metadata stripping and PDF software come into their own.

It is also a phase where, if handled badly, someone, usually a secretary (in a worst-case scenario *secretaries* plural at both the law firm and client ends of the chain) has to spend valuable time retyping documents because they have been reduced to a stylistic and formatic mess during the editing and revision process.

Although nobody has yet developed a system that covers the entire middle-ground, one product that covers a lot of the bases is the largely unsung House Style Manager (HSM) suite from Tikit that addresses many of the linked issues associated with document production.

Having initially started with the Template Management System (TMS), like Topsy, the HSM suite has just *grewed* and now includes the ReStyler module for reformatting documents back into the 'perfect' style they were in before they went through collaborative redrafting. There are also database connectors to most popular PMS, DMS and CRM systems to ensure document drafts contain the correct details, an email signature manager to enforce standard compliance and ➡

➡ branding information in Outlook signature blocks, and a printer control centre module to automate the customisation of printer settings. TMS is also now Unicode compliant.

As for traction, the HSM suite and its various modules are now being adopted by a growing number of UK and international law firms including Linklaters, SJ Berwin, Speechly Bircham, Wragge & Co, Maples & Calder and Bech Bruun.

Risk and the LSA/SRA

With so much focus on the commercial impact of the Legal Services Act, it is easy to overlook the fact the new SRA regime also introduces a new era of compliance and risk management – the so-called COLP & COFA provisions.

Brian Rogers, a partner and risk specialist with Manchester law firm Lewis Hymanson Small, estimates any practising lawyer (typically a partner) who becomes a firm's compliance officer can expect to see a 25-50% reduction in fee earning capacity. To tackle this, he has helped develop a new risk and compliance management system called Riliance, which is now being marketed and supported by a company that has Mark Gidge, previously with the finance and leasing business Sycap, as its CEO.

Riliance is a low-cost, web-based, stand-alone application (it does not require integrating with existing PMS or case management systems) that covers referral arrangements, complaints handling, claims handling, money laundering reporting, file auditing, high value file control, misconduct reporting and annual risk and compliance reviews.

Currently 10 firms have either gone live or are beta-testing Riliance and the company is now talking to vendors and insurers who might want to partner with them in bringing the product to market.

www.riliance.co.uk

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Is your data safe in their hands – and in their cloud

Although it is fascinating to see the way cloud computing has moved from the fringe to being a mainstream technology within such a relatively short period of time, many law firms seem to be overlooking the fact that the more they rely on cloud technology, the more dependent they become on the reliability, stability and credibility of their cloud technology services providers.

It may appear to be stating the obvious but you cannot risk business-critical applications and practice data being stored in the cloud if your cloud services provider is little more than a one-man-and-a-server-in-the-back-bedroom operation. Indeed the key decision in any cloud migration project should be not the viability and choice of the technology but the viability and choice of the services provider. And how do you achieve that? By doing a proper job of the due diligence.

Once again, nothing controversial about that. Yet if this is the case, how come we are hearing more and more tales of firms that have encountered problems – in some instances two and three day outages with no access to their data – because they are dealing with Mom & Pop cloud service providers. And why? Because they haven't done their homework. They haven't done their due diligence and pulled a copy of their would-be service providers accounts and spotted that they only have £500 in cash left in the bank.

Yes, we all know that left to their own devices, law firm partners will pick the cheapest option but cloud technology is a big boys game and they must be prepared to pay big boys prices.

New product launches

Secure those docs with Eclipse Eclipse Legal Systems has released a secure document delivery and acceptance tool. Called SecureDocs and embedded within the Eclipse Proclaim case management software, it uses the system's email messaging function to allow recipients to view and action documents, such as approving them for the next step in a case workflow. However the security of sensitive information (and the risk of it being inadvertently sent to the wrong person or released into the wild) is at all time protected because the documents can only be accessed by recipients with the prerequisite login details.

Stand Clear for new application Converge IT's dedicated legal IT services division Smartlegal (see also page 2) has launched Clear, a new business management tool for small-to-mid sized firms. Clear is designed to give users visibility and control over key practice disciplines, including HR, compliance, quality assurance, complaint handling, performance monitoring and asset management. Smartlegal's Nigel Wright says "instead of using spreadsheets and macros, Clear offers an intuitive, Microsoft Office-alike interface with user definable workflows, reports, KPIs and best practice guides." Like all Smartlegal products. Clear can be layered over the top of existing practice and case management systems.

www.smartlegal.it

Compliance finds a voice Voice and data specialist LegaliT247 has rolled out a converged file storage and security offering that allows law firms to extend retention policies to encompass voice as well as data. Called Compliance247, it can be configured to capture all calls by default, all calls by specified personnel or triggered on a call-by-call basis. Recordings can be kept for a user-definable period, with on-demand, instant ➔



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⇒ file retrieval. Compliance247 can be delivered on-premise or hosted on a pay-as-you-use model. www.legalit247.com

Follow Redbrick road Redbrick Solutions has launched a virtual desktop version of its Redbrick Practice Management system. The new virtual desktop allows users to access the Redbrick PMS hosted environment via web browsers, iPads and other tablets, and has Outlook integration for syncing diaries and emails when out of the office. www.redbricksolutions.co.uk

Buzzword corner: QR codes



Congratulations to Phoenix Business Solutions who became the first of our advertisers to use a QR (or *quick response*) code in their *Insider* advertising. Although they have been in use in the automotive industry for many years, it is only during the course of this year that they have really begun to take off in the wider commercial world.

Typically a QR code (in effect a barcode for mobile phones) will link to a piece of text, a phone number, an SMS message or website URL link. For vendors (and incidentally law firms) the URL is probably the most useful option as it allows them to link to a chunk of material, such as case studies, background information or other forms of sales and marketing collateral, that there isn't space for in an ad.

For similar reasons, QR codes are also starting to crop up on business cards as they can provide links to information that otherwise would not fit on the card. An added attraction is as long as the URL that the QR code links to remains the same, the web content can be updated and revised as frequently as required.

QR code readers can be downloaded free of charge for most mobile phones (although they must have a camera to scan the image) and there are also plenty of free QR code generating sites on the web. The Kaywa site is particularly reliable. <http://qrcode.kaywa.com>

People & Places

IntApp has expanded its sales and account management team with the appointment of **Richard Hill** as regional sales manager for the UK and Ireland. Hill was most recently a regional sales manager for Elite.

Microsystems has hired **Sarah Smithies** as their EU client relations manager. Smithies, who will be based out of London, has worked for such vendors as Interface Software and Tikit, as well as a consultant assisting start-ups.

The **SOS User Group** 20th national conference will take place at the Belfry Hotel on 8th November. The organisers say the combination of new format, venue and ABS theme has already attracted 'a bumper number of delegates'. The full conference agenda can be downloaded here www.soslegal.co.uk/images/features/Agenda_final.pdf

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Calm before the LSA storm

⇨ *continued from front page...* spectrum – from marketing through to online delivery, portals and on to client-centric business intelligence – the clear implication is that firms should consider shifting their spending from bricks and mortar to clicks and data. Not least because that is likely to be the model new ABS entrants into the market will adopt.

- **One size does not fit all:** Another key set of findings in the survey is that there is no one-size-fits-all approach to legal services delivery. Some clients want an out-of-hours option, others don't. Some clients want online facilities such as secure ebanking-type portals whereas others want telephone communications, face-to-face meetings or are even happy to wait for the post to arrive.

More confusingly, these are not mutually exclusive options. In the course of a single matter some clients may want all of these different approaches. Again, it comes down to knowing your clients, with the added incentive that because recommendations clearly still play such an important part in the legal service provider selection process, a satisfied client is not only more likely to stay with a law firm for repeat business but also to recommend them to prospective new clients.

The report – *What clients really want from a legal service provider* – presents the opinions of over 1000 consumers, 150 UK businesses and more than 160 law firms. The accompanying analysis was written by *Insider* editor Charles Christian. Copies of the report cost £50.00.

www.pepperminttechnology.co.uk/what-clients-want

10 years ago today ...

There was great excitement in October 2001 as news began to leak out that Linklaters was poised to announce the biggest order to-date in the legal IT industry, namely its migration to an ERP system based on SAP technology. The price quoted 10 years ago was a massive £18 million although the total bill eventually came in closer to £35 million. About £7 million went on the software and the remainder was spent on implementation, business process re-engineering and consultancy.

Talking of millions (or rather missing millions) over in Belgium, the digital dictation and speech recognition systems company Lernout & Hauspie was declared bankrupt, a harsh reversal of fortunes for a business that only 18 months previously was rated as Europe's second largest software company. And Oyez Straker, one of the oldest names in the UK legal forms, stationery and office supplies sector, was put up for sale for £90 million by its private equity backers.

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