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Elite buys Pilgrim + IRIS changes hands - again

Another month, another **Thomson Reuters Elite** acquisition, this time **Pilgrim Systems**, one of the longest established players in the UK practice and case management systems market. Unlike some deals, which leave everyone pondering their logic, Elite has bought Pilgrim (currently enjoying a boom in business largely at the expense of AIM, Videss and Axxia) to occupy the mid-firms slot in the UK and Asia-Pacific markets that Elite's Prolaw system has in North America. Pilgrim will continue to operate out of its Edinburgh offices as a separate business unit within Elite.

Comment: Pilgrim is the fifth major acquisition by Elite this year, a clear indication Elite has put the bad days of early 3E far behind it and now moved into what one former Thomson Reuters insider describes as the corporate 'happy box'. The deal should also bring a smile to Pilgrim users as it removes the cloud that's been hanging over the company's future for several years, as founder Jim Cummings secures an exit strategy he can enjoy in this life, not the next. And, it gives Pilgrim access to corporate resources it could never have built for itself. It also means Eclipse Legal Systems is now the UK's largest and still independent case and practice management systems supplier.

And then there is the **IRIS Group**, which last week saw former owners **HgCapital** invest £26.5 million to reacquire a majority shareholding in the businesses it helped sell to ➡

➡ Hellman & Friedman in 2007 as part of a £500 million recapitalisation deal in which HgCapital became a minority shareholder.

Comment: Confused? Yes we are too but City sources all describe Alex King of HgCapital as "a bright person" and suggest he "no doubt has a cunning plan to turn the companies around" although it remains to be seen whether this includes divesting any of the current business. Following last March's restructuring, IRIS will also continue to operate as two separate businesses, namely IRIS Accounting and IRIS Software Group (which includes the IRIS Legal systems division).

Pannone goes live with Sharepoint 2010 DMS

Pannone LLP has begun the rollout of its Microsoft Sharepoint 2010-based document management system. The system is currently going out to the firm's 100-strong Commercial Services Division, along with Office 2010 and Windows 7, as part of a complete desktop refresh. The DMS builds on the increased integration between Office 2010 and Sharepoint 2010 by imposing a matter-centric structure on the native functionality and adds a series of add-ins for Office and Web Parts to further increase integration. The system is augmented by the deployment of Microsystems DocX Tools 6.2 for document cleaning and styling.

Development took around nine months in total and was handled entirely by the firm's IT team. In deciding to develop inhouse, the firm compared the high cost of purchasing off-the-shelf solutions and contractor costs with the relatively low costs of leveraging the IT team's expertise and existing Microsoft volume licensing arrangements. Additionally, the use of native Word 2010 features has resulted in a reduction in support costs with third party suppliers. *See also article on page 6*



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Thorpe leaves Aderant - last of the superstars?

David Thorpe, aka 'the Thorpedo', who until the end of November was the company's EMEA general manager, has left Aderant. Senior vice president for global sales David Flynn is currently overseeing UK sales operations however Aderant is reviewing its internal management structures.

Comment: Like him or loathe him, Thorpe has the reputation for being the best salesman in the UK practice and financial management systems space and for pretty much single-handedly establishing Elite as the market leader in this country. In the debate that followed our first report on *The Orange Rag* blog, one of the issues to arise was the apparent trend among larger, consolidating vendors to replace legal IT domain expertise specialists for people with generic (and possibly cheaper to hire) business skills. So is David Thorpe one of the last superstar legal IT sales people?

There are still a few good men – and women – out there (although you could fit them all into one London black cab) but after Thorpe the last remaining superstar is probably Geoff Hornsby of Autonomy iManage, who reputedly made more commission out of just one sales deal last year than the total turnover of three of the market's smaller software vendors.

EMEA news round up ...

Portuguese DMS win Portuguese law firm PLMJ Sociedade de Advogados, which has 300 users in offices across Portugal, Angola and Mozambique, is swapping out its legacy Hummingbird document management system in favour of Epona's Sharepoint-based DMSforLegal product.

Partner of the Year Norwegian systems house Conteso AS has been named as the OpenText eDOCS partner of the year for its work with law firms and corporates in the Nordic region. ➡

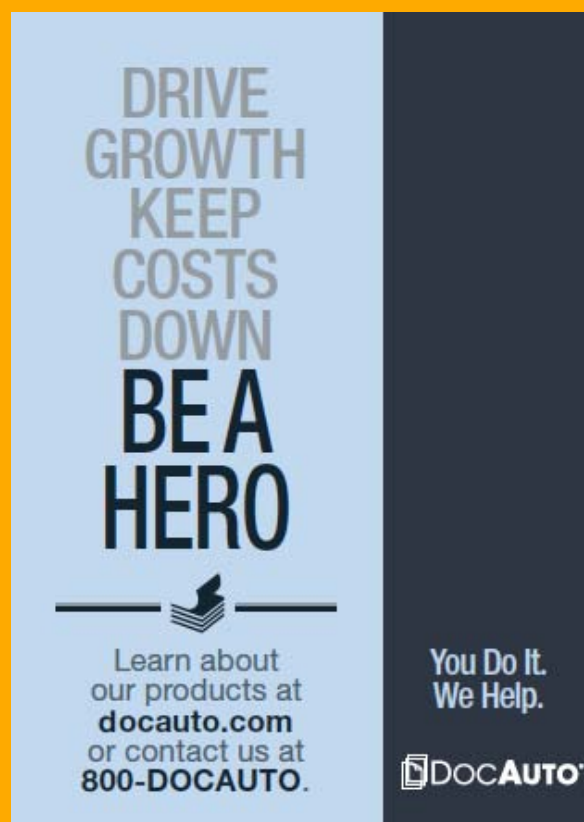
➡ **South African alliance** nQueue Billback has entered into an alliance with EMSys (Expense Management Systems PTY) which has offices in Cape Town and Johannesburg, to help it expand into the South African market. Three law firms have already signed up for the cost recovery systems and more deals are under negotiation.

www.emsys.co.za

DocsCorp grows in Europe Three European law firms (Beiten Burkhardt in Germany, LK Shields in Dublin and Andres Bodin Fastigheter in Sweden) have gone with the pdfDocs Desktop suite from DocsCorp for managing PDF content.

AMMC iManage deal The European systems house I.R.I.S. has won the contract to supply and implement an Autonomy iManage DMS at the Luxembourg law firm AMMC Law. The project will see the firm switch to digital matter files.


InterAction international LexisNexis reports that 62% of its InterAction CRM sales in 2011 were in EMEA, APAC and South Africa – and 70% of these were outside the UK.



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December's wins, deals and rollouts

This month's prize for the biggest deal announcement goes to **Eclipse Legal Systems** who last week signed up 200-user London law firm **Hodge Jones & Allen LLP** for an order worth £250,000. The firm has selected Eclipse Proclaim Case Management software for its crime, family, personal injury and employment law teams, along with Proclaim Matter Management for non-prescriptive areas of work and Proclaim Accounts for its new PMS. Insider records show this is an SOS and LexisNexis Visualfiles combo swapout.

- **Slater Hayward Law** is implementing Proclaim Case Management to handle mis-sold bank PPI (payment protection insurance) claims.

Lewis Silkin has selected OnePlace from **KnowledgeMill** as its new email management platform. OnePlace was selected from a short-list of three products with the assistance of the **TDCGE** IT consultancy. The firm's director of IT & Operations Jan Durant commented "2012 will be big in e-filing. We've all been trying for years to get people to save emails into document management systems but mostly they don't. This is because they love Outlook so we're in the process of deploying something that sits in Outlook, looks like Outlook but is in fact its own database and infinitely more scalable than Outlook."

www.knowledgemill.com

Tikit has taken three more law firm orders for its recently launched Microsoft Outlook-based ClientConnect CRM system. The three firms are **Breeze & Wyles Solicitors LLP**, **Black Solicitors LLP** and **Barnes Marsland Solicitors**. It may have come from a standing start in a crowded market but it looks like Client Connect is gaining traction.

Pinsent Masons LLP has selected the **Frayman Group's** Compliguard system to provide its new business intake workflow, information barriers and compliance platform. The firm will integrate Compliguard with its Aderant PMS, iManager DMS and Saleslogix CRM systems.

Darbys Solicitors LLP is the latest firm to join the **Peppermint Technology** partner

programme. The firm, which recently launched its *Purple Legal* and *Blue Law* brands, already uses the Peppermint Portal product but has now joined the partner programme to help shape the accounts, residential conveyancing and debt control elements of Peppermint's Legal Service Platform software.

Farrer & Co has selected **Copitrak** to supply it with disbursement management, charge back and scan workflow systems. The key driver was the need for a scanning workflow providing tight integration between the firm's new MFDs (multi function devices) and its OpenText DMS.

Sheffield-based **Howells Solicitors** has awarded managed services provider **e-know.net** a contract to deliver its Managed Desktop solution to 200 users in five locations. The outsourcing project will see the firm's SOS PMS, plus Microsoft products, Bighand digital dictation, Dragon speech recognition and Oyez electronic forms hosted and supported by e-know.net.

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More wins and rollouts

DocsCorp is continuing its run of new business wins with **Lewis Silkin** rolling out the entire pdfDocs Solutions Suite (including the Binder, compareDocs and formFiller applications) and **Payne Group** Metadata Assistant in an implementation that sees the DocsCorp software integrated with the firm's Microsoft Sharepoint platform. Other recent wins include **Scott Rees & Co** in Lancashire (pdfDocs Desktop) plus **Watson Farley & Williams** and **GVA Grimley** in Birmingham both increasing their licence count for DocsCorp software.

Meanwhile back at **Farrer & Co**, the firm has also adopted **Xsigo** virtual I/O technology to increase the flexibility of its IT infrastructure. The firm's IT operations manager Andy Beech said the firm's legacy infrastructure was hardwired with each server having direct attached storage. The Xsigo project, which also included rolling out VMWare virtualisation software, has provided the firm with an improved disaster recover capability, a 33% reduction in the number of servers and the ability to implement infrastructure configuration changes "significantly quicker".

- Xsigo is pronounced zeego

www.xsigo.com

Newcastle-upon-Tyne based **Muckle LLP** has completed an IT infrastructure refresh with cloud and virtualisation specialists **SITS Group**. The project has delivered secure remote access to data for staff, along with improved disaster recovery and full offsite data replication.

www.sitsgroup.com

Independent managed print IT services company **M2** has been working with **Copittrak** to reduce the print spent at **Pannone** and avoid unnecessary print consumption. Through a combination of Copittrak's *Follow Me Print* solution, a mixed fleet of printing devices and an internal print room, called the M2 Docucentre, which provides a centralised facility for photocopying, binding and bulk printing, the firm has saved £140,000 in print and copying within 12 months. The Docucentre currently produces over three million B&W copies and 650,000 ➔

➔ prints a year for the 600 lawyer and staff firm.
www.m2.uk.com

Leeds-based **Shulmans LLP** has recently deployed the **Blackberry** to over 40 fee earners and staff. IT manager Ross MacIntyre said "Despite the recent negative press Blackberry has received, we still feel it presents the best choice for a firm like ours to deliver mobile productivity. The extra functionality, security and performance we gained made the decision to replace our Windows Mobile devices with Blackberry easy."

Cheshire lawyers **Oliver & Co**, who provide in-store legal advice at the Chester branch of WHSmith through their involvement with the **Quality Solicitors** group and its LAP (Legal Access Point) scheme with WHSmith, have been working with legal software house **Smartlegal** to devise an automated lead management solution. Clients now complete a form on an iPad at the LAP and the information is automatically sent to the firm's Smart CRM system, also supplied by Smartlegal.



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Voice technology news

New VP of sales at Winscribe Winscribe has appointed former KPMG Consulting sales director Colin Wilson as its new global vice president of sales. He joined Winscribe at the start of this month, coming from sales training consultancy First Border, where he was the managing director. Wilson had previously been working with Winscribe on its sales force structure in his capacity as a consultant.

Yodal City win A Magic Circle firm, described only as 'one of the world's largest law firms' (we believe it is Allen & Overy) has signed a global licence with V7 Technology and is now deploying V7's Yodal digital dictation service for Blackberry smartphones to fee earners internationally via the firm's BES network. The Yodal Player transcription software will become part of the firm's standard workstation configuration.

Comment: We first reported on Yodal in July 2010 (LTi#233) and it is interesting that a firm of this size should opt for this approach instead of a more traditional digital dictation workflow system. V7 has also published a case study in which one of its early adopters – 41 fee earner practice EBR Attridge – estimates Yodal will save it £10,000 over three years on the cost of a traditional DDS hardware and software platform.

www.v7technology.com + www.yodal.com

Merlin sees Bighand magic Loss adjusters Merlin Claims is the latest organisation to swap-out portable dictation devices in favour of a Bighand for Blackberry solution. As part of the project, the firm upgraded from nFlow to Bighand 4, so users can also now attach photos and documents to dictations awaiting transcription. The firm has begun trialling Bighand's integration with Dragon speech recognition.

- Emma Sarson has joined BigHand as key account manager for the supplier's legal top-100 customers. Sarson has many years' experience working with large law firms, corporations and investment banks.

New product launches

Frayman launches v6 The Frayman Group has released Compliguard Protect 6, the latest version of its ethical walls, information barriers and confidentiality management system. According to Frayman Group senior VP Mohit Thawani, v6 contains a raft of new features "many of which are industry firsts," including: automatic clash resolution to proactively identify multi-wall clashes and the ability to create dynamic groups based on such criteria as 'all partners in litigation'.

Catch the DR bus LegaliT247 has announced BusCon247, a new online tool to help small-to-mid sized law firms kick-start their business continuity and disaster recovery planning. Available on a free trial basis, BusCon helps create, review and test a basic DR plan.

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2012 to be crunch year for dictation industry ?

It is traditional at this time of the year to make predictions about the coming 12 months, so here's one of mine: it is going to be a crunch year for the dictation and voice technology industries.

Hardware vendors, such as Philips, Grundig and (assuming it survives the current financial scandal in Japan) Olympus are going to see the demand for their portable digital recording devices fall yet further as more law firms spot the economies that can be made by switching to running digital dictation software on smartphones, such as the Blackberry, iPhone and (in the US at least) Android. Why take two devices out of the office when one will do? (See also page 5.)

However before DD vendors start to feel smug, it is also worth noting that with speech recognition finally taking off, some firms are now dropping the total number of digital dictation software licences they run, as more fee earners stop dictating and switch to Dragon speech recognition.

And let's not even get into the argument about the impact of Generation X and Y in the legal workplace – people for whom dictation and transcription by any means is an alien concept because they can and do prefer to type.

Finally, there is another legacy of Steve Jobs: the new *Siri* voice interface on the latest iPhones. This is a potential game changer as it offers a viable alternative to keyboards and mice as a way of operating and controlling electronic devices. Maybe that is the future of voice technology: as a command and control medium?

Why Pannone built itself a Sharepoint DMS

by David Griffiths, head of IT Pannone LLP

The idea of using Sharepoint as a legal DMS has for some time divided opinion. There are arguments (for the main part originating from traditional DMS vendors) that it is not quite fit for purpose, that it lacks features, can be unperformant and doesn't scale to enterprise level.

These are arguments which could certainly be levelled at versions prior to 2010, and to some extent it is true that out of the box Sharepoint is not quite a perfect fit for legal. However, with foresight, careful planning and design and the right project team, as we have proven at Pannone it is possible to deploy Sharepoint 2010 alongside Office 2010 as a top-class, fully integrated DMS.

As more and more organisations are realising, Sharepoint 2010 does indeed cut it as a DMS. Gone are the old, obvious weaknesses of upper content limits and missing document numbers and in their place come the DMS features missing from MOSS to complement the existing core, managed metadata, social tagging, micro-blogging, document-level workflow and other features, all wrapped up in a true enterprise collaboration platform, natively and fully integrated with Office.

So Sharepoint now delivers a quality DMS but there remain a number of significant barriers to adoption as a legal DMS: matter-centricity, scalability, Outlook integration and document migration paths. To address these challenges there are traditional models: the purchase of off-the-shelf products and add-ins, expensive consultancy, etc. In the good times, these were perfectly viable routes. However in times of increasing financial pressure we are seeing a small but significant number of forward-thinking law firms addressing



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⇒ these issues head-on using in-house skills.

At Pannone our ambition was clear: to deliver a solution with the relatively low costs of leveraging our IT team's expertise and our existing licensing arrangements with Microsoft. With the aim of minimising initial expense and TCO, we skilled our Sharepoint architect and lead programmer through intensive training and Sharepoint boot camps, and our trainers through Office 2010 specialist courses.

This investment in people provided us with the skills to provide a tremendous platform from which to deliver the solution. We designed and built a highly scalable series of environments, optimised for fast retrieval of documents and designed with expansion in mind. We have augmented the native Word/Sharepoint integration with a matter-centric series of Office add-ins and Sharepoint features which instantly assign matter-specific metadata to documents. Crucially, we have developed add-ins for Outlook which extend the power of the solution seamlessly into the email area, adding functionality above that available in commercial offerings.

Complementary to all of this we have implemented Microsystems DocX Tools 6.2 for document cleaning and styling, and Metavis Migrator for seamless migration of documents from legacy systems into our Sharepoint DMS. We have also gained further cost efficiencies by using native Word 2010 features rather than relying on third party products.

We have ambitious plans for the medium term and longer. We have already implemented Sharepoint 2010 via UAG as our client portal, and aside from continuing our DMS rollout, early next year we plan to implement a new intranet *My Sites* and a knowledge management project using Sharepoint.

The present is certainly bright for Sharepoint and Office as complementary technologies and, as we know, these are core Microsoft products and the roadmap for the next five years features them heavily. They will most certainly continue to be developed and there are exciting rumours about what is coming in Sharepoint 2013. If we consider the opportunities to leverage Sharepoint even further as a case ⇒

⇒ management/workflow tool the arguments for adoption become even more compelling.

Until now legal IT professionals have wondered whether they can take a chance on Sharepoint as a DMS. In these cash-strapped days, the question is now whether it is sensible not to invest in Sharepoint as a low-cost but high value solution.

There's an app for it

Mimecast iPhone app Mimecast has extended its mobile services for the iPhone with a new app that effectively gives users a bottomless online inbox, so they can have uninterrupted access to all new and received emails even if their Microsoft Exchange service is down, as well as the ability to search and access archived emails. The app is free and available for download from the iTunes Store.

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News in brief

Proactis and Elite Spend control specialist Proactis has entered an alliance partnership with Elite that will result in closer integration between the Proactis eProcurement system and the Elite accounts system. Clifford Chance, DLA Piper, Hill Dickinson, Herbert Smith, Barlow Robins and the Law Society already run Proactis.

Certification in Tamworth IT outsourcing company Quiss Technology is now an authorised testing centre offering courses and exams in Microsoft Office 2007 and 2010, that lead to the Microsoft Office Specialist (MOS) certification.

Saturn on top of the moon 27H Limited, which trades as Saturn27, says its latest accounts filed with Companies House (for the year to 28 February 2011) show "substantial growth in both turnover and profitability." Professional services director Andy Stokes adds "We are seeing a trend towards engagement on more strategic projects, such as geographic diversification, profitability initiatives, alternative fee arrangements and financial reporting."

Forensics for EMEA Huron Legal, formed earlier this year when the US-based Huron Consulting Group acquired Nigel Murray's Trilantic litigation support and ediscovery business, has launched a digital evidence and computer forensics service for the UK, European and Middle East markets.

PTS goes global PTS Consulting Group has teamed up with Chelsea Technologies, which ➔

➔ has offices across the USA, to create a global managed services offering, so law firms no longer need to manage multiple vendor relationships.

10 years ago today

Looking back a decade, we see history repeating itself with some of the issues that were in the news in December 2001 still being topical today. Our top story asked whether Elite was going to upset the DMS apple cart with the launch of its Encompass document management system based around Microsoft SharePoint Portal Server technology? The answer turned out to be 'no' and 10 years afterwards 'traditional' DMS vendors are still holding their own against the latest iteration of Microsoft SharePoint software. And, as Aderant are discovering today, the jury is still out on whether a vendor with an established reputation in practice and financial management can readily translate this into similar success in the DMS sector.

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