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English Law Society takes a stake in COLP & COFA specialist

The Law Society of England & Wales has become a shareholder in the privately held software company Riliance, which since the autumn of last year has established itself as the market leading online support platform for law firm COLP and COFA compliance work. The agreement, which includes an equity investment by the Law Society, provides for the Society's involvement in further development of the product and promotion of Riliance as part of the Law Society's risk and compliance service.

Law Society chief executive Desmond Hudson said "Our stake in the company will benefit our members, who can have continued confidence in the suitability of Riliance to help them manage risk and satisfy the SRA." Riliance chief executive Mark Gidge said he was "delighted to have the Law Society as our partner and looked forward to working alongside them." He added that Riliance would soon be signing up its 250th customer and aimed to have 1500 law firms using the system by October 2013.

Winners & losers - 10 years of the Insider chart

Legal Technology Insider has now been publishing its listings of the IT systems used by the UK's 200 largest law firms for ten years. In this edition we publish a special report comparing and [↔](#)

[↔](#) contrasting our first chart in 2003 with our latest chart for 2012. So who are the winners and who are the losers among legal IT suppliers? Turn to page 2 to read our analysis and find out.

Peapod + Pace Pro deal

Pace Professional Systems has been acquired by the Peapod LegalOffice group, in a move that Peapod CEO Ian Wimbush says will help the company strengthen its user base in the North of England and move into the Scottish law firms market for the first time.

Pace Pro's LawPro system will now become part of the Peapod product range and will be actively developed, sold and supported by the business's new owners. Pace Pro directors Derek Bruce and Ronnie Paton will remain with the new organisation as directors and will continue with 'business as usual' including the development of future releases of the LawPro software.

Today is our 17th birthday

With this issue we're celebrating 17 years of providing news, comment and analysis to legal IT professionals. Yes, it was in October 1995 that the first issue of an irreverent newsletter, printed on bright orange paper, burst upon an unsuspecting legal technology community.

Back in those simple pre-internet days, we only produced a hardcopy edition of the newsletter (we subsequently launched a digital edition in 1997 and this year we launched an iOS app version) but, as we blow out the 17 candles on our cake today, we are pleased to confirm we will continue to publish a print edition, as well as keeping pace with evolving digital platforms.

As for the future? We are committed to leading legal IT news, comment and analysis worldwide. We are already working on a major revision of our online platform and content *plus* in December we will be announcing some very exciting news about this newsletter. Stay tuned.

Legal IT suppliers - who are the winners & losers?

INTRODUCTION When it came to compiling our analysis and comparison of the 2003 and 2012 Top 200 Charts, to ensure the results were on an even playing field, we adjusted the 2003 vendor names to their current names. So, for example, Solution 6 becomes Aderant, Hummingbird becomes OpenText. In addition, to reflect the consolidation that has taken place, so the 2003 data is meaningful, we have combined the 2003 vendors together in their current 2012 corporate groupings. So, AIM, Videss and Opsis 2003 sales are listed as IRIS, Axxia and Visualifiles as LexisNexis, Pilgrim and FWBS as Elite, TFB and ResSoft as Tikit.

Our rankings are based on the number of law firm sites a vendor has, not the total number of seats nor the value of those deals.

ACCOUNTS & PRACTICE MANAGEMENT

In 2003 there were 23 separate vendors vying for a slice of the PMS cake. Today, despite all the mergers and acquisitions, there are still 18. That said, some vendors have very small slices with 9 companies only having 14 sites between them.

The **Top 5 UK PMS suppliers** today are

- (1) **Thomson Reuters Elite** (inc Pilgrim) up from 56 sites in 2003 to 76 in 2012.
- (2) **LexisNexis** (Axxia) down from 43 sites in 2003 to 30 sites in 2012.
- (3) **Aderant Expert** up from 25 to 27 sites in 2012.
- (4) **SOS** up from 11 sites to 15
- (5) **Tikit** down from 12 sites in 2003 to 11 today.

In terms of market share, in 2003 the four biggest vendors held 70% of the market between them, with Elite on 27%, LexisNexis on 21%, Aderant on 12% and IRIS Legal on 10%. In 2012 they still share 75% between them but the split has radically altered with Elite now up to 40%, LexisNexis down to 16%, Aderant up to 14% and IRIS down to 5%. Other winners and losers include Eclipse which has increased from 1 site to 5 sites and Miles 33, which has seen its Top 200 share halve from 10 sites to just 5 in 2012. ➔

DOCUMENT MANAGEMENT SYSTEMS

Document management traditionally falls into four camps: firms using one of the "Big 2" DMS applications, firms using an alternative DMS, such as Worldox or Sharepoint, firms using the DMS functionality of their PMS or case systems, and firms with no formal DMS just network folders.

In 2003, 49 firms were using OpenText, 42 were using iManage, 12 were using an alternative DMS and 17 were using their PMS/case software. In 2012, despite the supposed rise of Sharepoint, only 9 firms were using an alternative DMS, 20 were using PMS/case, 14 were using OpenText and 93 were using iManage.

In terms of the Big 2's market share of firms running DMS, OpenText has seen its slice fall from 41% to 10%, while iManage has seen its increase from 35% to 68%.

CASE MANAGEMENT + WORKFLOW + BPM

It is not unusual in this sector for a firm to be running multiple systems from multiple vendors, with the result that in 2003 there were 32 vendors in this space. By 2012 this had increased to 42!

...Continued on page 6 ➔

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Who's in & who's out: October's wins, deals swapouts & rollouts

IP specialists **Joshi & Welch**, who operate as an ABS, have rolled out SOS Connect from **Solicitors Own Software** "to turn off the dripping tap" of lost time. The firm is running SOS time recording and document management in conjunction with its trademark management software.

Keoghs LLP, which was described at a conference in Australia earlier this autumn as one of the UK's top providers of defendant claims-related legal services, has signed a three year contract with **Steria UK** for end-to-end infrastructure services including remote service desk, onsite support, data storage, disaster recovery, business continuity and server virtualisation to Steria's private cloud.

www.steria.com/uk

Foys Solicitors, with five offices in South Yorkshire and North Nottinghamshire, has contracted with **Linetime** for a virtualised solution to increase the resilience of the firm's server infrastructure. As part of the deal the firm, which already runs Linetime practice and case management software, will also be rolling out the latest versions of Microsoft Office, Exchange and SQL Server. In another Linetime deal, **Oxley & Coward LLP** has further extended its contract with Linetime to update its Liberate practice and case management software. The firm will also be using the updated system to monitor compliance processes and assist with COLP and COFA.

IRIS Legal says it is "not all doom and gloom" in the smaller law firms sector of the market with a raft of new orders coming in for its IRIS Opsis product. Recent signings include **Clarity Family Law** (against **DPS**), **Pearson Solicitors**, **Ice Blue Legal**, new start-up **Adler Fitzpatrick** plus **Sarah Edmunds Legal** and **Hobbs Law** who went for the hosted version of IRIS.

DocsCorp is continuing its winning streak in the UK and Europe with new wins including two Scottish firms: **Harper Macleod** which is →

→ taking Content Crawler and **Burness Solicitors** going with CompareDocs. Both deals were through **Phoenix Business Solutions**. Over on Mainland Europe **Hengeler Mueller** in Germany is deploying Content Crawler, **Miranda** in Portugal has purchased Metadata Assistant and **Krogerus** in Finland has swapped out **Workshare** in favour of CompareDocs and PDFDocs.

Watson Farley & Williams and the Irish law firm **A&L Goodbody** are the latest firms in this region to sign up for DocXtools from **Microsystems**.

Linder Myers has selected the Smartlegal suite of services from **Converge IT** to augment its inhouse IT capability for network management, disaster recovery and helpdesk operations.

Wilson LLP has implemented the **Copittrak** eCclipse embedded MEAP solution for Canon copiers and printers. Along with the copy/print cost recovery and management, it also handles rules based printing and secure print release.

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More wins & deals

Legal telecoms specialist **Total Ltd** has announced a raft of new orders, including deals at **Bentleys, Stokes & Lowless, Covington & Burling, Gill Akaster LLP** and **Kingsley Napley LLP**. Kingsley Napley's head of IT **Thereza Snyman** commented "Quite apart from the competitive pricing, throughout the selection process Total demonstrated a thoroughness and professionalism that was impressive. The proposal was transparent and all my questions were addressed."

In addition Total Ltd subsidiary **K-Cloud** has installed a cloud-based managed solution at **Camilla Baldwin** including **Mimecast**, DMS, PMS and digital dictation software. Total has also won the landline business of Gloucestershire firm **Winterbotham Smith Penley LLP**, while an existing user of Total landline voice services **Goldsmith Williams Solicitors** has also installed an inbound disaster recovery solution.

P2 Technologies has won a contract from Lancashire law firm **Dickinson Parker Hill** to provide it with P2's OneSupport service, which includes 24/7 network monitoring, helpdesk, onsite service and strategic advice.

www.p2tech.co.uk

Two South African organisations – **Absa Africa Technology** (part of Absa Bank, a member of the Barclays group) and **BoE Trust** private client services – have both endorsed Kent-based **DPL Professional Solutions** for its Document Plus, KBZ and Chameleon document assembly and automation systems. BoE used DPL for wills assembly work, while Absa uses DPL for wills and its new client needs analysis tool.

www.dplprofessionalsolutions.com

DWF LLP has selected the **Logicalis** cloud-based ImmersiV video conferencing as a service to replace its legacy ISDN video conferencing platform. ImmersiV is a monthly pay per use consumption model that runs over the firm's IP network.

www.logicalis.com

Finally, **Nabarro** has used **Exponential-e** to help extend its corporate WAN to its Singapore office. The firm had been using VPNs which, ➔

➔ because of the distances involved, had resulted in unsatisfactory performance. The Exponential-e solution was to create a VLAN to Singapore using VPLS based connections to achieve a 1Gbps network to support voice, internet and data backup. Nabarro now has a three site global WAN linking London, Sheffield and Singapore.

www.exponential-e.com/professional-services

News in brief

PRENUPS ONLINE London law firm May May & Merrimans has launched a prenuptial agreements website at www.prenups.uk.com

JUDGE IMPRESSED A court bundle produced by the CaseLines online system was recently described as "immaculate" by HHJ Behrens in Leeds High Court. www.netmastersolutions.co.uk

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Even more wins & deals

The decision by Portsmouth law firm **Andrew & Andrew** to replace its legacy DPS case management with **Eclipse Legal Systems** Proclaim conveyancing and personal injury case management software bumps the total number of Proclaim users to just over 17,000. The deal also includes implementing Proclaim's A2A system for processing RTA claims through the MoJ portal.

Lancashire and Cumbria-based **Holdens Solicitors** has deployed the **Bighand** digital dictation plus **Nuance Dragon** speech recognition integration throughout the firm. The system automatically transcribes fee earner dictations and then forwards them (along with the original voice file) to secretaries for proofing and document production.

South Yorkshire law firm **Howells LLP** has replaced its existing time and attendance system

with the SelectHR full self-service HR, training, development, timesheets and appraisals system from the **Access Group**. HR manager Claire Asquith estimates the new system will save the 200-staff firm 11 hours of administration a week.

West Midlands firm **Higgs & Sons** has used the **Phoenix** IT Group (no relation to Phoenix Business Solutions) to handle a complete IT refresh including new Microsoft software stack (Exchange 2012, upgrade from Office 2003 to Office 2010), server virtualisation and installing a new SAN. The firm expects to save £30,000 a year on reduced power/cooling and maintenance cost alone.

Norwel time on iOS

Norwel Computer Services, in conjunction with Rekoop, has released a mobile time capture system for the iPhone and iPad platforms.



REUTERS/Hamad I Mohammed

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Legal IT suppliers - the winners & losers

⇒ Continued from page 2... In 2003 the runaway market leaders were Axxia and Visualfiles (now LexisNexis) who between them had 73 sites, with what are now the IRIS companies in second place with 18. In 2012, LexisNexis is still hanging on to the top spot with 58 sites but IRIS is down to 13 and we now have Thomson Reuters (via MatterSphere, Lawsoft and FlowSuite) in second place with 42 sites (compared with 6 in 2003). Also ones to watch are Metastorm (now OpenText BPS) up from 4 sites to 21, Linetime, up from 7 sites to 19, Eclipse, up from 4 sites to 18, and probate specialist Isokon, up from 7 to 13 sites.

By market share of installations in firms currently running this type of software, the **Top 5 UK Case/BPM etc suppliers** today are

- (1) **LexisNexis** on 37% (down from 56%)
- (2) **Thomson Reuters** on 27% (up from 4.5%)
- (3) **OpenText BPS** on 13.5% (up from 3%)
- (4) **Linetime** on 12% (up from 5.5%)
- (5) **Eclipse Legal Systems** on 11.5% (up from 3%)

CRM & MARKETING SYSTEMS

More changes in the market with Hubbard One being swallowed by Elite and Interaction by Lexis Nexis but since 2003 it has been a constant three horse race between Interaction, Elite and the Rest of the CRM World.

In 2003 Interaction was in 42 sites whereas today it is 62, Elite was in 21 sites while today it is in 43, and 'all others' are up from 11 sites to 26. Not all firms run CRM (and some run Interaction in conjunction with Hubbard One) but of the 110 practices that are currently using it, Interaction has a 56% market share while Elite has 39%. We expect Aderant's acquisition of the CRM4Legal application to have an impact on market share in the coming years.

DIGITAL DICTATION & VOICE TECHNOLOGY

The big corporate changes over the past decade were Bighand's acquisition of the No.3 player nFlow and Winscribe's shift from primarily selling

⇒ through resellers to selling direct (and in one instance actually acquiring one of its former resellers, namely SRC). The net result is the market has consolidated from 15 suppliers selling a variety of systems to just 5 products although 3 of these have only 4 sites between them.

Back in 2003, Winscribe and its resellers had a total of 18 sites between them, today they have 30 sites. Meanwhile Bighand (including nFlow) has increased the number of its sites from 42 to a massive 139.

Back in 2003, digital dictation was only just taking off, so market data was blurred by the number of firms running pilot projects however of the 70 firms with DDS, Winscribe had a 26% market share, while Bighand had 60%. Like CRM systems, digital dictation software still has a *Marmite* flavour, with not all firms using it, but out of the 173 Top 200 firms currently running DDS, Winscribe now has a 17% market share compared with 80% for Bighand.

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Swings and roundabouts for Recommind

It's been a month of mixed fortunes for Recommind. The good news is the company announced one of its biggest deals to-date in the UK legal sector, with Slaughter & May deploying Recommind Decisiv Search as its knowledge management search solution. Decisiv will provide Slaughter & May's 1250 legal and non-legal staff in London, Brussels, Hong Kong and Beijing with a search facility across the firm's know-how, intranet content, DMS and library sources.

The bad news is Recommind has just lost its longest-standing law firm customer in the UK – Lewis Silkin – which is phasing out Recommind Decisiv Search in favour of the Microsoft FAST search engine (plus BA Insight TotalView) as the firm's Microsoft Sharepoint culture is expanded.

There is also bad news from DLA Piper, which earlier this month announced it intended to standardise its enterprise search globally on Microsoft FAST, Sharepoint and BA Insight Total View. The firm will retain its HP iManage DMS search facility but will be dropping Autonomy IDOL and Recommind enterprise search functions to focus on FAST, which the firm describes as "a better strategic bet."

New version of Insider news app available

We've just released a new version of **The Orange Rag** legal IT news app for the iPad and iPhone. New features include: improved compatibility for iOS6, added support for the iPhone 5, enhanced UI plus various graphical tweaks, including improvements to search making it easier to find older content. Version 1.1 of the app can be downloaded from the Apple iTunes App Store. And yes our little gnomes in the App Cave are now gearing up to create versions for the new iPad 4 and iPad Mini devices.

www.itunes.com/apps/theorangerag

Channel News

QUILL JOINS SOA Quill Pinpoint has become an approved member of the Solicitors Outsourcing Association. The SOA is a new organisation that aims to vet outsourced services providers to ensure law firms only deal with suppliers with legal sector expertise and the ability to comply with quality standards. The SOA chair is Graham Leigh, the senior partner of GLP Solicitors.

www.thesoa.co.uk

OPES UP 30% Kevin Smith, managing director of Opes Consulting, has been in touch to say that for the trading year to August 2012, turnover is up 30% and profits up 10%. The firm, which specialises in Elite 3E and Enterprise projects, has also recruited two more consultants, bringing the total team to six. Over the past 12 months Opes has been involved in integration projects at two of the biggest ...*continued on page 9* ➔

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⇒ UK law firm mergers in recent years (DAC/Beachcroft and BLG/Clyde & Co) and now has over 25 direct Elite customers. The firm also works with IntApp and Chrome River however Smith adds “From top 20 law firms to sub-50 timekeeper firms we are simply focused on delivering solutions that customers want.”

www.opesconsulting.co.uk

ONLINE RESOURCE EXPANDS Glasgow-based CaseCheck reports that it has seen a substantial increase in demand for its online legal resource and case summary services, with over 20,000 subscribers now on its books. Prices start from around £2 a week for individual users.

www.casecheck.co.uk

ACCESS IN ALLIANCE WITH ELITE HR and payroll specialist Access Group has signed up as an alliance partner with Thomson Reuters Elite. The deal will see Elite users have a dynamic link to the Access SelectHR and SelectPay products.

www.theaccessgroup.com

People & Places

Melody Easton, who we last encountered handling marketing for Ascertus (now Huron Consulting) and Prosperware, has just been appointed EMEA marketing manager by **DocsCorp**. Her immediate boss at DocsCorp is **Ben Mitchell**, the company's EMEA VP, who previously headed sales at the DMS vendor OpenText. Until three years ago Melody was the European marketing programmes manager at Interwoven (now **HP Autonomy iManage**) who were – and still are – the arch-enemy of OpenText. Apparently Melody's former boss at iManage **Geoff Hornsby** was apparently not best pleased at the news Melody now works for Ben.

Sad news from **Damian Griffiths**, who runs the **VProfessional** consultancy and, before that, was the IT director at **Addelshaw Goddard**. As a result of a serious illness, Damian is winding up his consultancy to concentrate on recovery but says “I don't think I'm out of the legal IT ⇒

⇒ sector for good – down but not out as it were.” He adds “Give me angry partners, stressed out techies or belligerent salespeople instead anyway!” We wish him all the best for the future.

Reader Discount on event

The Ark Group is running a new one-day conference in London on 28 November at the De Vere Holborn Bars. Called *Business Development for Law Firms in the Connected World* the event will be looking at mobile, social and web strategies to reach the new generation of clients.

Insider editor Charles Christian is giving the keynote on *Adapting the Legal Business to meet the needs of the Changing Client* and we are offering a **20% reader discount** on tickets. To take advantage of this offer email Nathan Denham at ndenham@ark-group.com using the code **PBD20**.

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17 years ago today...

When we look at our launch issue from October 1995, we see not so much archive content as industrial archaeology. There was the Scottish law firm Dundas & Wilson choosing to invest in Novell NetWare for its networking platform because it felt Microsoft Windows NT "did not stand up to the task in hand".

There was London law firm Garrett & Co selecting an Axxia Arista practice management system (running on Informix + Unix) out of a short-list of eight suppliers. The then leading legal sector speech recognition software distributor (digital dictation had yet to take off) Kolvox Voicewriter was offering the IBM VoiceType product on an IBM OS/2 PC operating system.

Shipping firm Sinclair Roche & Temperley was upgrading from Wordperfect 5.1 DOS to Wordperfect 6.1 for Windows, as well as installing Novell SoftSolutions for document management. Finally, price-wise, you could buy a Dell Dimension PC with 16Mb of RAM and a Pentium processor, running Windows 95, bundled with Office 95 and an HP LaserJet, for £1650 + VAT.

Buzzword: Cloudwash

The digital equivalent of putting go-faster stripes on an old car – moving some functions of an application onto the internet but calling it the Cloud because that is a trendier name. The 1995 equivalent – running old DOS applications in Windows – was called *Windows-dressing*.

Vital Statistic: 2-to-3 years

Speaking at last week's NetLaw Media *Strategic Leadership Forum* event in London, the entrepreneur and CEO of Hamilton Bradshaw (and former *Dragons Den* TV series panellist) James Caan said he was amazed to discover some of the law firms he discussed equity investments with had websites that clearly hadn't been updated for two or three years. Caan eventually invested in Midlands firm Knights Solicitors, which he aims to grow into a top 100 firm within three years.

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