



Aderant®  
**StarLaw™**

Seamlessly Manage Documents,  
Records, and Emails

Enterprise Information Management [www.aderant.com](http://www.aderant.com)



**AMERICAN  
LEGAL  
TECHNOLOGY  
INSIDER**

US & Global Legal IT News

## Microsoft turning its back back on legal sector ?

Microsoft has announced the closure of its Redmond-based specialist legal vertical market team with immediate effect. Jobs are being lost including Norm Thomas, who has been the public face of Microsoft at events like ILTA for many years. The impact this will have on current Microsoft legal sector projects, including the Sharepoint DMS and native Word redlining initiatives at Clifford Chance are unknown at this time. Microsoft is also expected to cut back on legal-sector marketing and events sponsorship. This is the text we received from our Microsoft contact...“Today (4 August) we learned the disheartening news that Microsoft is closing its Legal & Professional Services sales teams entirely, effective immediately, and everyone associated will no longer be with the company after Friday.”

## Workshare and Litéra let slip the dogs of law

Workshare Technology filed a civil action in the US District Court for the Southern District of New York on 28 July alleging patent infringement by rival vendor Litéra Technology. The dispute centers on patent – granted to Litéra by the USPTO on 22 February this year – for ‘methods of managing

↪ metadata in attachments to emails in a network environment’ which is core to Litéra’s server-side metadata cleansing system.

Workshare said they “do not comment on any pending legal situations.” while Litéra founder Deepak Massand told the Insider “We will vigorously defend our rights... We are confident the USPTO’s decision to issue this patent will be upheld by the courts.” He added that “rather than discuss matters with us directly, Workshare chose to file a pre-emptive suit, leaving us with little choice but to enforce our intellectual property in court.”

- In related news, Microsystems has acquired the key assets and rights to 3BClean, another player in the server-based metadata cleansing systems sector, from its developers 3BView Limited, which has now ceased trading. Mindful of the Litéra patent, Microsystems (the exclusive distributor of 3BClean in the North American legal market since 2009) has also licensed the relevant IP from Litéra. Both Microsystems and Litéra have hired former 3BView staff, with Microsystems committing to continuing to support and enhance the 3BClean system.

See also *Christian UnCut* column on page 7...

## At ILTA ... and in print !

After three years of publishing an exclusively digital version of this newsletter, we are honored to produce our first-ever print edition to coincide with this month’s ILTA event in Nashville. This issue also sees the first appearance of our editor Charles Christian’s new *Christian UnCut* opinion column.

We would like to thank Hubbard One and Elite (both part of Thomson Reuters) for their support. If you would like to receive future copies of American Legal Technology Insider free of charge in a PDF file format, please send a note of your email address to [altisubs@legaltechnology.com](mailto:altisubs@legaltechnology.com)

HUBBARD ONE.

ELITE.



So many solutions, so little space

Learn how we help over 100,000 iManage WorkSite users worldwide.  
[www.DocAuto.com](http://www.DocAuto.com) • 800-DOCAUTO

DOC AUTO  
FUNCTIONALITY IS A FUNCTION OF YOU.

WorkSpace Management  
Reporting/Exporting  
Works with WorkSite

## August's wins and rollouts

**Four firms to POC alt DMS** Epona USA, which is trying to gain a foothold in the North American market with its out-of-the-box Microsoft SharePoint-based DMS-for-Legal document management system, reports that four law firms and corporate legal departments in the US and Canada have now chosen the software for Proof of Concept (POC) implementations. The four are the CCS Corporation and Macleod Dixon LLP both in Calgary, Saiber LLC in New Jersey and Burr Forman LLP, which has offices across the South-East.

[www.eponausa.com](http://www.eponausa.com)

**Australian win for Aderant** De Groot's Wills & Estate Lawyers in Australia has selected Aderant Expert as its new practice management system. Aderant recently announced that its APAC sales force is on track for a record year.

**Three more for the coach** Traveling Coaches has signed up three more law firms for its technology training products. Memphis-based Baker Donelson Bearman Caldwell & Berkowitz has purchased CLASSE elearning content, Luce Forward Hamilton & Scripps in San Diego has bought the Office 2010 user adoption package, while top 100 firm Akerman Senterfitt has selected Office 2010 and Autonomy iManage rollout materials.

**Refining Sharepoint** SAPREF, the South African crude oil refinery, has selected the Brava! Enterprise for Sharepoint system from Informative Graphics (IGC) to view and collaborate on Microsoft Office documents, TIFF images and AutoCAD drawings.

**Dictation migration** Over 500 users, including attorneys at Williams Mullen in Virginia and Cline Williams Wright Johnson & Oldfather in Nebraska, have switched from 'antiquated' dictation systems to the latest digital dictation workflow plus support ➡

➡ for mobile working on smartphones software from Bighand.

• Victoria (Australia) law firm Ryan Carlisle Thomas has also upgraded to Bighand 4 to give attorneys the ability to dictate via smartphones during courtroom downtime or when they are out of the office.

**E-discovery deal** Waters & Kraus has selected the nXT platform from iConnect Development to support the firm's ediscovery services.

**Debt collecting software** Citing benefits in process automation, e-filing and customization, Johnson Mark LLC, which is based in Utah and specializes in debt collection and creditor rights work, has replaced its Columbia Ultimate debt collection software with a new system from Latitude Software (part of Interactive Intelligence Group Inc).

[www.debtsoftware.com](http://www.debtsoftware.com)



For a better workflow

Going from your voice to your text document has never been quicker  
[www.philips.com/dictation](http://www.philips.com/dictation)

**PHILIPS**  
sense and simplicity



**Accelerate™ eDiscovery Results with Predictive Coding™**  
Case study at: [www.recommind.com/accelerate](http://www.recommind.com/accelerate)

**RECOMMIND™**  
Out Predict. Out Perform.

**WILMERHALE®**   
WILMER CUTLER PICKERING HALE AND ORR LLP

## Tikit enter CRM sector with own offering

The Tikit Group (probably best known in the North American legal market as the provider of the e-marketing suite add-on for the Interaction CRM and as the new owner of the Carpe Diem and Time KM products) has launched its own inhouse developed marketing and client relationship management system for law firms. Called ClientConnect, it comprises contact management, business development, sales and marketing support, reporting and e-marketing.

Tikit say the key differentiator is it combines professional, firm-wide marketing and CRM functionality with a low cost of ownership and ease of implementation (*Tikit reckon the installation to go-live process should be less than a third of the time taken to implement traditional CRM systems*) thereby addressing issues that have previously hindered the wider adoption of legal CRM systems.

Training should also be simpler as the entire application (including e-marketing) is embedded within Microsoft Outlook, so if you can use Outlook, you can use ClientConnect. Another potential saving is the full audit trail should remove the need for complex data change management processes, as well as the extra cost of employing data stewards. Unlike many new CRM projects, ClientConnect is not built on Microsoft Dynamics CRM but developed entirely within Outlook (v2007 & above) with an underlying SQL Server database.


- Tikit will be showing ClientConnect at ILTA.

## Flosuite bought, Elite wins

Last month was a busy time for Thomson Reuters on the acquisitions front and this month seems is no different. The latest deal to be announced is the acquisition of the Scottish case management and ➡

➡ workflow software provider Flosuite Legal Solutions, whose systems are in use with law firms in the UK, Australia, Canada and the Cayman Islands. Thomson Reuters say Flosuite will be 'aligned' with the groups Legal UK & Ireland business and will "accelerate TR's move into software and productivity solutions for the UK legal market." The terms of the deal were not disclosed.

Elsewhere on Planet TR, Elite has reported that Minter Ellison, one of the largest law firms in the Asia-Pacific region, has selected Elite 3E as its new financial and practice management platform. This is Elite's fourth major 3E win in the region in 12 months. Back in 2000, Minter Ellison was one of the first firms to adopt the Keystone system, which subsequently became part of Aderant.



**100's of US law firms have turned to the pdfDocs suite**

Manage your legal documents more efficiently, more securely.

Find out more at [www.docscorp.com/legal](http://www.docscorp.com/legal)

**pdf Docs**  
SOLUTIONS SUITE



## ILTA product launches

**Dealing with Dodd-Frank** Following its work with leading US law firms (the Insider understands these include MoFo and Davis Polk) on the provision of regulatory tracker products around the Dodd-Frank Act, HighQ (a provider of secure document exchange, extranet and collaboration systems in the UK and Australia) has now opened offices in New York City, headed by Michael Worth, the former sales & marketing director at Kraft & Kennedy. HighQ's secure, cloud-based SaaS application allows attorneys to share confidential documents with specific groups and collaborate across globally distributed networks of attorneys, clients and partners, whether they are inside or outside the firm.

- *HighQ will be on the Kraft & Kennedy stand.*

**Best Authority 3.0** Levit & James will preview Best Authority v3.0, the next major release of its Table of Authorities production software. Slated for a Q1 2012 launch, the upgrade will include a final version preview mode and be significantly faster, so processing large documents with thousands of citations "will be effortless".

**And then there were three** Prosperoware says the products it is launching will "shake up the IntApp/Frayman duopoly" and provide law firms with a far wider choice. The systems being launched are: Enterprise Zone which introduces e-legal process management and a new way of social working; Milan Legal Hold which makes it easier to execute legal holds in iManage Worksite; Milan for Sharepoint which enables the automatic provisioning of Sharepoint in the matter opening process; and finally, Milan Ethical Walls has been expanded to include multi-systems notifications and acknowledgements for full compliance.

**We are seven** Workshare will be showing its newly released Workshare Professional 7 software. Behind the scenes the key change is a simplified installation process optimized for integration and management across an enterprise. For end users probably the most significant new feature is the provision of automatic detection and comparison of changes when attachments are sent, modified and returned

through email, with users alerted directly in Outlook. The Insider saw this feature in a beta release and believes a key attraction is it only fires up when a modified document arrives, so you only spend time comparing documents that have actually changed. There is also a convenient category view option for document comparison and the metadata removal interface has been redesigned.

**Sharepoint update** Business Integrity will be showing ContractExpress for Sharepoint 4, the latest version of its contract management and document assembly system, which has now been upgraded to take advantage of new features in Sharepoint 2010.

**Westlaw form builder** Thomson Reuters has added Westlaw Form Builder to its product portfolio, a new online document assembly tool, designed to improve speed and accuracy when attorneys are preparing legal forms. The system also includes links to cited authorities on WestlawNext at no extra cost.



**OUTGROW YOUR OFFICE SPACE, NOT YOUR SOFTWARE.**

**ELITE 3E ANTICIPATES YOU.**  
Business is fluid. Are your business processes? Elite 3E®, the only true 64-bit software, lets you easily create more efficient processes to work smarter in a competitive global market. It's scalable, and with multi-currency support, it's one step ahead of wherever you want to do business. To learn more, visit us at Booth 623 or online at [elite.com/3e](http://elite.com/3e).

 **THOMSON REUTERS®** 

© 2011 Thomson Reuters L-370268/8-11  
Thomson Reuters and the Kheops logo are trademarks of Thomson Reuters.

## There's an app for it

**Video depositions on an iPad** Nexpoint Inc's Trial Cloud system now offers full iPad support, including streaming deposition video. Nextpoint R&D VP Ben Wolf said the enhancements were introduced after the company saw how quickly the iPad became integrated into people's daily workflows.

<http://nextpointlab.com>

**DMS to go** World Software will be previewing its Worldox Web Mobile 2.0 software at ILTA. Along with providing users with access to their documents via the web and mobile devices v2.0 also offers a native iPad app.

[www.worldox.com/products/worldox\\_webmobile](http://www.worldox.com/products/worldox_webmobile)

**I time keep on my iPad** Bellefield LLC, a new company set up by Gabriela Isturiz, the president and co-founder of eBillingHub (now part of ↗

↗ Thomson Reuters) has launched iTimeKeep. The company describes it as "the only native, 100% integrated mobile timekeeping iPad app". Available as a free download from the iTunes Store, it offers two-way communications with most time and billing systems including Elite, Aderant and ProLaw. [www.itimekeep.com](http://www.itimekeep.com) + [www.bellefield.com](http://www.bellefield.com)

**Smart Time for smartphones** Smart WebParts is now shipping Smart Time Mobile. The system allows attorneys to enter time directly via a smartphone (including Android, Blackberry, Windows Phone 7 plus the iPhone and iPad) and a mobile browser but without having to download an app.

[www.smart-webparts.com](http://www.smart-webparts.com)

**ILTA app** And finally, if you haven't done so already, download the excellent ILTA 2011 iPad app from iTunes. Without doubt the best event program scheduling app we've ever seen. Congratulations also to Intelliteach for sponsoring its development.



Providing **document collaboration** solutions  
to more than **1.8 million professionals**

### Introducing:

- Workshare Online
- Workshare Point 1.2
- Workshare Professional 7
- Workshare Protect Server 2.1

[www.workshare.com](http://www.workshare.com)



## Tikit ClientConnect

### Maximising client engagement

#### The future of CRM for law firms

- Simplified approach
- Fast to implement
- Low cost of ownership



Visit us at ILTA  
**Booth #828**

Find out more about Tikit ClientConnect  
[www.tikit.com](http://www.tikit.com)



Brian Dunlop  
Chief Financial Officer, London  
Allen & Overy LLP

# ELITE 3E WORKS FOR ALLEN & OVERY

*"We wanted a system that could grow with the firm, with everyone on the same platform, subject to the same controls, accessing the same relevant information."*

– Brian Dunlop

The greater its global reach, the more Allen & Overy appreciates having its more than 2,800 lawyers in 36 cities in 26 countries on one global platform. The Elite® 3E financial and practice management system enables the firm to monitor profitability, maintain compliance, and deliver real-time information on dashboards to help achieve the best outcomes for clients. View their 3E® success story at [elite.com/allenoverly](http://elite.com/allenoverly).



**ELITE®**

© 2011 Thomson Reuters. Thomson Reuters and the Kitesis logo are trademarks of Thomson Reuters. L-37/0267/F-11





## Is going legal the new legal IT paradigm?

I blame Recommind for starting this trend with its announcement earlier this year that it

had secured a patent for its 'iterative computer assisted document analysis methods' and that any other ediscovery vendors claiming they could offer 'predictive coding' had better licence Recommind's technology or face the legal consequences. Not surprisingly the other vendors were less than impressed by this and accused Recommind of cynically trying to confuse the market to their commercial advantage. Now, as we report on our front page, Workshare and Litéra are engaged in a similar patent dispute, although this one has already turned legal, in connection with server-based metadata cleansing systems.

So why now? Is the problem differentiation? Far too many vendors offering products that not only offer broadly the same functionality but even look the same because they all share the ubiquitous Microsoft Outlook interface? Faced with a stalemate on the features front, are vendors resorting to increasingly drastic methods to win business and fight competitors, including spreading fear, uncertainty and doubt to scare off their rivals' prospective customers? Add a stalled economy to the mix and I predict 'going legal' will become the new paradigm for doing legal IT business.

## Will goal based suit you?

With training for rollouts in big demand this year, Capensys has been engaged by a number of major legal organizations (including Dewey & LeBoeuf, Littler, Kramer Levin, Lewis Brisbois and LexisNexis) to provide blended learning for Office 2010 (including Innova, MacPac, Payne, CCC Macros), Autonomy FileSite, NetDocuments and other legal applications.

Capensys employs a goal-based training approach that begins by interviewing lawyers and staff to determine how they work and what they need to know. From this, learning objectives are established and the training blend determined to deliver better targeted, shorter training sessions.

The training blend includes marketing videos, scenario-based e-learning, hands-on workshops and post-rollout coaching. Capensys has also developed a series of tools to support training departments with their rollouts. These include the Pathfinder diagnostic tool, which allows users to pinpoint what training they most need, based on how they work, and then generate a personal learning track for each user. In addition, a completely new build of the AngelCoach context-sensitive performance support tool, allows users to access training directly from the application.

Capensys is a training partner of HBR Consulting and its senior management team includes co-founder Sue Pasfield, Janis Richman, director of consulting services (and ex-Hildebrandt Baker Robbins), Marion Deland, director of courseware and Ian Brown, director and UK sales manager. Brown replaced sales consultant Simon Meager, who left the company in February 2010.

[www.capensys.com](http://www.capensys.com)



## Tackling the challenge of 'big data' in the value chain

*Guest article by Angel Garcia-Manso, Hubbard One*

The legal industry is changing. In order to drive growth, firms are improving efficiencies and increasing the predictability and value of the legal work delivered to clients. Firms are also evolving as businesses and examining more productive ways to undertake initiatives like budgeting, legal project management and alternative fee arrangements.

One area of focus in this quest for improved efficiency and value is the information assets that lie within firms. Specifically, firms are looking to analyze information in order to gain more insight into their business and client relationships. Furthermore, firms are eager to share information with critical audiences to aid in their decision making processes and to communicate and collaborate more effectively.

However, there's an immense growth in the amount of information – what researchers have coined as 'Big Data' – and information is becoming harder to access and integrate because it exists in a number of content silos. Law firms, like the rest of the world, are suffering from information overload. So how can firms turn large amounts of raw data into useable information, and then valuable knowledge and finally actionable intelligence?

That's where the Value Chain Theory comes in. Introduced in 1985 by Michael Porter, the Value Chain Theory establishes a framework – a strategic planning analysis tool – that defines the various processes and activities that are involved in producing products or services where each activity adds value to the product or service as it moves through the chain. This notion can easily be adapted to the information challenge faced by firms today.

The Information Value Chain encompasses the activities that help transform masses of data into valuable intelligence. By combining the information value chain with the appropriate delivery ➡

technology, it is possible to create a flow of information across the firm that delivers great value to each user by presenting to them just the intelligence they need to act.

In addition, being able to consolidate all information from across different systems and content silos and ensure all data goes through a data quality process, can increase the caliber of your information assets and allow for a more effective delivery and transfer of knowledge. Organizations are applying analytical and statistical methods as part of their information value chain activities to take advantage of and transform these large data pools into valuable business intelligence that ultimately will drive competitive advantage.

The trend of Big Data is just now being introduced at law firms. In these early days, it is critical for firms to identify the information, technology and procedures needed to ensure that they are able to capture, clean, analyze and share the most valuable information with the audiences that drive their success.

- Angel Garcia-Manso is responsible for Hubbard One's OneView solution. Most recently he spent 10 years at Goodwin Procter LLP where he was responsible for IT project management, system integration projects and firm-wide strategic initiatives as part of the firm's steering committee responsible for AFA, budgeting and LPM.

[www.hubbardone.com](http://www.hubbardone.com)

## Vital statistics: 2 million

eBillingHub, which is now part of Thomson Reuters, reports that it has now processed more than two million electronic invoices since its introduction into the market in 2004, with a record-breaking 98,277 invoices processed in June 2011 alone. The company adds that it is on pace for a 70% growth rate in submissions over last year, reflecting the increasing adoption of ebilling among US law firms of all sizes.

[www.ebillinghub.com](http://www.ebillinghub.com)



**An insider's view into doing business  
in the legal technology space**





**Reliable, affordable 100% legal-focused service desk support**  
 After Hours Support. Overflow Support. Complete Service Desk Outsourcing

[www.intellitech.com](http://www.intellitech.com) | 866-698-7837



## New hires, people & places

**Lori Page Hall** has joined **Levit & James Inc** as Director of Product Innovation working on new product development projects as well as marketing existing products. Most recently, Ms Hall was VP of marketing & communications at DocAuto.

**nQueue Billback** has promoted **Darren Ford** to the post of Chief Technology Officer. He will continue to be based at the company's Arizona head office but in his new role will be responsible for all new technology initiatives as well as managing the US and Australian development teams.

PDF integration specialist **DocsCorp** has added **John Hitchins** to its North American team as regional sales manager. Prior to joining DocsCorp, Hitchins held sales roles with American LegalNet and Hummingbird (now OpenText).

Fort Lauderdale ediscovery management company **Credence Corporation** has appointed **Chris Johnson** as its new vice president of sales. Johnson, who is also an active officer in the US Navy Reserves, has worked in the litigation support services industry for 10 years.

**Traveling Coaches** has recruited five new members to its account management and learning development staff. They are **Amy Nichols, Ryann Zeller, Paula Anderson, Jerah Hutchins** and the fabulously named **Mandy Outlaw**.

As part of its strategy to move into the North American law firms sector, London-based marketing technology company Vuture has recruited Matt ➡

➡ Parfitt as President of Vuture US. Previously VP of business development at Concep Inc, Parfitt will be responsible for developing the company's US operations out of its New York City offices.

[www.vuturegroup.com](http://www.vuturegroup.com)

E-discovery specialist **Trial Solutions** is using this month's ILTA event to promote its change of name to **CloudNine Discovery**. The change reflects the broadening of the company's product and service offerings, including cloud storage, as well as the positive image of being on cloud nine!

[www.cloudninediscovery.com](http://www.cloudninediscovery.com)

• By coincidence, the holding company for this newsletter used to trade as CloudNine Technology although that was derived from the name of a horse.

## American Legal Technology Insider

American Legal Technology Insider is available free of charge as a PDF. To subscribe email

[altisubs@legaltechnology.com](mailto:altisubs@legaltechnology.com)

**Editor-in-Chief: Charles Christian**

Phone: + 441986-788666

Email: [altinews@legaltechnology.com](mailto:altinews@legaltechnology.com)

**Advertising Manager: Philip Woolley**

Email: [philip.woolley@innovatorsinlaw.com](mailto:philip.woolley@innovatorsinlaw.com)

**The next issue** (No.38) will be published on Thursday 15 September. To keep up with the latest legal IT news visit the [www.theorangerag.com](http://www.theorangerag.com) blog

ISSN 1758-5023 © American Legal Technology Insider 2011





REUTERS/Vicente Kessler

# THE FUTURE ARCHITECTURE OF LAW FIRM INFORMATION

A New Foundation for Information Exchange

Join us at ILTA and discover how we are creating an exciting new foundation for law firm information management and exchange. Visit Hubbard One at Booth 415-417

[hubbardone.com/Informationexchange](http://hubbardone.com/Informationexchange)



THOMSON REUTERS®

**HUBBARD ONE.**