



The Law Society

A guide to integrated practice
management software

software
solutions 2008

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LEGAL SOFTWARE
SUPPLIERS ASSOCIATION



A word from the President

I am delighted to commend this, the 10th edition of the Law Society's Software Solutions Guide. For a decade this Guide has been the most influential and important source of information about the legal software systems available to solicitors in England & Wales.

While not intended to provide an exhaustive list of all the options available, the 15 case and practice management software suppliers featured in this Guide have passed a rigorous vetting procedure thereby providing you with an excellent starting point for your IT purchasing decisions. This vetting procedure includes an evaluation of their products by our selection panel, an independent review of their finances and detailed customer service market research; see page 4 for full details.

Over that time we have seen many changes, and although the need to evolve and to keep pace with that change has been a constant, it has never been more important than today. Last autumn saw the completion of the passage of the Legal Services Act. It was a landmark piece of legislation and has quite literally changed the legal landscape forever. There can be no doubting the future will be one of new competition, new challenges and new opportunities.

The solicitors and the practices that fare best in this new legal services reality will not necessarily be the biggest, but the nimblest and those that are the most efficient, effective and businesslike in all that they do.

Having an IT system that meets your needs must be at the very top of your list. There was once a time when IT systems, together with a proficiency in IT skills, were viewed as a useful, but not entirely essential, skill for solicitors. Those days, like the days of the non-competitive practice, are gone.

The relationship between technology and business practice will assume a renewed strategic importance for many firms who will soon need to decide how to position themselves in relation to IT-related challenges like electronic conveyancing and the growing market in online legal services.

IT is a substantial investment so it is important it is the right IT equipment. Extraordinarily sophisticated technology is not an add-on. It is an essential part of the infrastructure necessary to provide an efficient service to clients.

I hope this guide contributes to giving you and your practice the competitive edge it will need in the years to come.

A handwritten signature in black ink, which appears to read 'Andrew Holroyd'. The signature is fluid and cursive.

Andrew Holroyd
President - The Law Society

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Introduction and explanation of the scheme

The Software Solutions Guide is designed to help law firms make more informed decisions about legal IT suppliers. Each year, the Law Society invites specialist legal software suppliers to apply for inclusion in the Guide. The Law Society is happy to recommend the suppliers featured in this Guide, who have met the criteria outlined below.

Selection criteria

Suppliers need to demonstrate the following:

- Financial stability
- Satisfactory customer feedback research
- An integrated practice management system

Financial assessment

The accounts of each company are examined by independent accountants, who analyse profitability, liquidity, cash flow and turnover and assess the ability to pay creditors. Suppliers must meet a defined minimum score to be included in the Guide.

Customer feedback research

Approximately 40 customer firms per supplier are selected at random and are interviewed by independent market researchers. Customers are asked to rate their supplier against a range of factors such as ease of use and quality of training and support and the overall rating for each factor is published in the Guide.

Software and company assessment

Suppliers are asked to attend a meeting with the selection panel, where they demonstrate their software. The selection panel pays particular attention to specific features, which this year included email integration, money laundering checks, client conflict checking and compliance in general.

Final assessment

The selection panel makes the final decision on which suppliers should be included in the Guide, based on the selection criteria outlined above.

The panel

David Cannell - Director, Cinnammon IT Consulting
Robin ap Cynan - Council Member, Principal, Lupus Mediation

Neil Davidson - Solicitor, Harrowell Shaftoe
Tony Fisher - Managing Partner, Fisher Jones Greenwood

Mike Gorick - Practice Director, Marshall & Galpin
Tim Hill - E-commerce Policy Adviser, Law Society
Stuart Whittle - Partner and Head of IT, Weightmans

It should be noted that the selection panel does not undertake detailed technical testing and relies on the representations of suppliers. With this in mind, firms are advised to make their own enquires as to the validity of claims. As the purchase of software is a private contractual matter, the Law Society cannot accept any responsibility for disputes resulting from the information in this Guide, nor intervene directly in disputes.

Funding of the Guide

This Guide is funded entirely from contributions received from the suppliers included in the Guide. This funding enables the Law Society to carry out the customer feedback research, production, printing, administration and free distribution of the Guide to all law firms in England and Wales.



The Legal Software Suppliers Association (LSSA) is again very pleased to be supporting the Law Society in the production of this latest edition of the Software Solutions Guide.

The LSSA is the industry body for legal systems suppliers in England and Wales. For over thirteen years we have represented all the main legal software suppliers and currently 26 of the leading legal system suppliers are members (many of whom are featured in this guide).

Whether your firm is a sole partner practice or a top ten law firm, your interests are represented by the broad range of representation of LSSA members, specialising in solutions to law firms of all sizes. As an association, our software is in use by in excess of 75% of firms in private practice.

The LSSA provides an extremely representative and unified voice for the legal software industry and is best placed provide a key role and focus in establishing standards and cooperation between suppliers, professional bodies and government organisations.

Simon J. Meehan
Chairman LSSA



We have set up and actively contribute to a number of different working parties and forums, representing and lobbying on behalf of our members with HM Land Registry, HMRC, PISCES, Court Service and the LSC.

The legal profession and legal software industries never stand still, and neither does the LSSA. New technology and constantly changing legislation mean the LSSA strives to be at the forefront to assist and advise law firms on how best to adapt to and embrace new technology, legislation, evolving business models and growing customer requirements.

There can be no doubt that modern legal software systems make a significant contribution to the overall success of any law firm. If you are looking to change any of your legal software, make sure you improve your chances of success by including LSSA members on your shortlist.

Ultimately we are only successful if your firms are successful in gaining real benefits from your legal software solution.

For a full list of our members visit our website at www.lssa.co.uk



Introduction

We've all rather been lulled into a false sense of security about the pace of change in legal IT over the last few years. After a lengthy period of stability, the next three years will see significant change in server- and client-side software that heralds an equally significant change in how lawyers deliver services to their clients.

Put this alongside the longer-term effects of the Legal Services Act 2007 (LSA) - particularly third-party capital and Alternative Business Structures (ABSs) a few years down the line - and it really isn't an exaggeration to say that we stand on the edge of a period of unprecedented structural change in legal services.

The use of IT in law firms - whether in a large or small business law practice, a busy high street practice or an efficient supplier of bulk or commodity debt collection or insurance services - is at the heart of this change.

The practice management system (PMS) vendors are now really getting to grips with the technology maps of Microsoft and other larger vendors and what this means for their own PMSs and law firm customers' IT upgrades. Vista, now starting a period of rapid commercial uptake, 'is the largest and, potentially, the most disruptive change in the operating system space since 2000 and organisations will discover that Vista cannot be adopted without a careful examination of its impact on their overall end-user management processes' (Stephen Kleynhans, Gartner Group 'Major wave technological advancement to meet the needs of tomorrow's work force', October 2006).

And it doesn't stop there: powerful 'back office' products such as Microsoft's SharePoint Server, and line-of-business products such as Microsoft CRM Dynamics and IBM Websphere, are starting to go beyond the traditional role of law firm IT and change how lawyers work day to day.

This is all before you even mention Google, broadband Internet and Web 2.0, and the concepts of 'Software as a Service' (SaaS), 'Service Oriented Architecture' (SOA), virtualisation and grid computing that may, in the not too distant future, have lawyers using software applications like electricity at the flick of a switch.

Take CRM (client relationship management) systems for example. Many PMS vendors have developed and supply a bolt-on module that enables their PMS customers, for a separate licence (and maintenance) fee and some more consultancy, to bolt on CRM functionality to the core PMS financial and contact data. Microsoft's new generation of line-of-business products like CRM Dynamics are not developed for a particular industry sector like professional services, but have core 'out of the box' CRM functionality that can be relatively easily tweaked by the software/services house and even the law firm. These aren't easy projects for law firms to manage and deliver to the lawyer at the desktop, but they're on the cards and will give greater choice, challenges and, to those firms who make the right calls, opportunities and benefits.

“ Law firm IT will have an ever greater impact on areas of legal advice that can be characterised as amounting to information repackaging or the product of a basic process. ”

Again, law firms have invested significantly in standalone document management systems (DMs). But powerful search systems on the desktop or server such as Google or Microsoft's Server Search Express, now or shortly commercially available, will give firms more flexibility and choice as to how to manage their information, especially if you can add third-party content (like PLC, Halsbury's, Westlaw or Bloomberg) to the firm's own data to be searched.

The holy grail of a unitary business intelligence (BI) system for all the firm's data - client, know-how, technical legal, financial, practice management, target, business research - starts to become more than a vision when you look at it like this. After a somewhat bumpy start, BI systems are likely to become widespread in legal in the next few years.

As well as looking at particular areas like PMS, CRM, DM and even BI, law firm IT will have an ever greater impact on areas of legal advice that can be characterised as amounting to information repackaging or the product of a basic process.

In a recent survey that our firm conducted with PLC on the use of IT at in-house legal departments, general counsel expressed the clear view that technology will have a 'huge impact' within the next decade on lower-value information repackaging services - for example in less complex employment law issues through online information services (to get you to the 'last mile') and helplines (to get you home) - and on basic processes such as

straightforward sales contracts (contract automation and databases), litigation (electronic document management and discovery) and transactions (due diligence tools).

These changes won't happen overnight, but what will happen in the in-house legal department reflects the same sorts of drivers for change that characterise the market for law firm legal services - the need for greater efficiency and value.

In the law firm world, as in many other industry sectors, the combination of technology advances (such as those described above) and liberalisation (e.g. the LSA) will fuel change and are in turn fuelled by them. In private practice, technology investment - perhaps to computerise the more routine parts of the larger projects for 'intelligence'-based computerised decision systems with a helpline for the 'last mile' of the questions at the commodity end - will emerge as a key driver in gaining external investment.

My crystal ball is as good as anyone else's for predicting what will happen, when, and what will emerge as key turning points. But one thing's for sure: the ride will be bracing, invigorating and stimulating for those in private practice who stay flexible and alert to change and embrace the challenge of technology.

Richard Kemp is senior partner at Kemp Little LLP

Independent View

Access Legal Systems

Access Legal Accounting and Time Recording System can be run as a stand alone application or integrated with Access Practice and Client Database, Case Management and Time Capture modules to provide the full range of practice management, marketing and fee-earner support systems.

Business head

Access's strategy is to enable legal firms to be run more like other businesses than they typically are today. Consequently, while development effort has been devoted to ensuring the software complies with the latest LSC requirements for legal aid work, the company has also concentrated on automating low-margin work through tight integration of the various functions of its software.

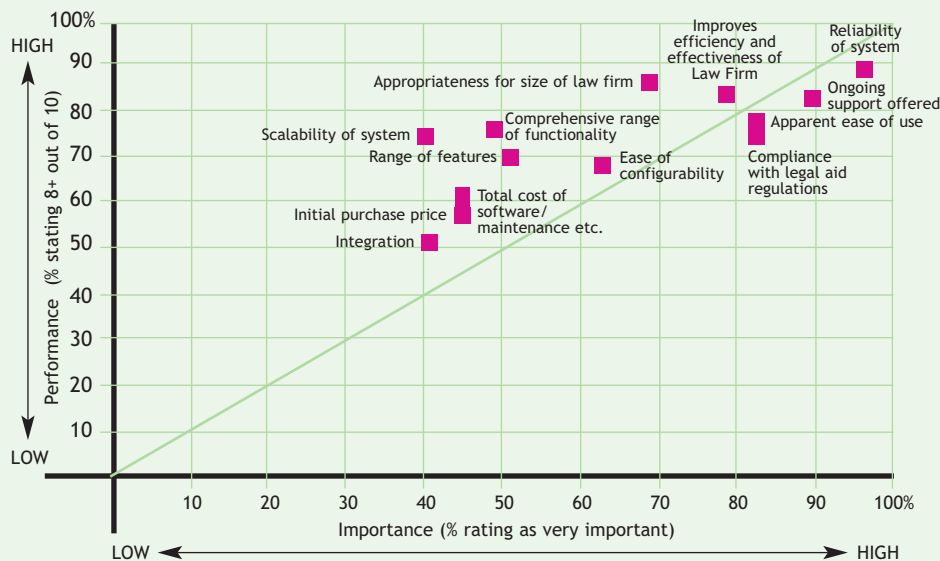
It's also keen to emphasise the provision of information that will help practices become more efficient and business like. For example, the LSC requirements of e-lodgement have been implemented in the software and the output of the case management modules integrated with the core accounts system to perform automatic billing.

Court out

Another example of more 'corporate' thinking at Access is about mobility and how the system handles out-of-office time recording for fee-earners, for example, when they attend court but work on other matters while waiting. Normally the time recording here is done manually, but Access allows matters to be 'checked out' to a laptop and worked on remotely. When the fee-earner returns, the system synchronises with the laptop, updates the checked-out matter and automatically records the time spent working on it. Think of it as a sophisticated version of Microsoft's venerable Briefcase idea.

Either way, mobility and remote working are hot topics for work/life balance, new ways of working and business continuity discussion.

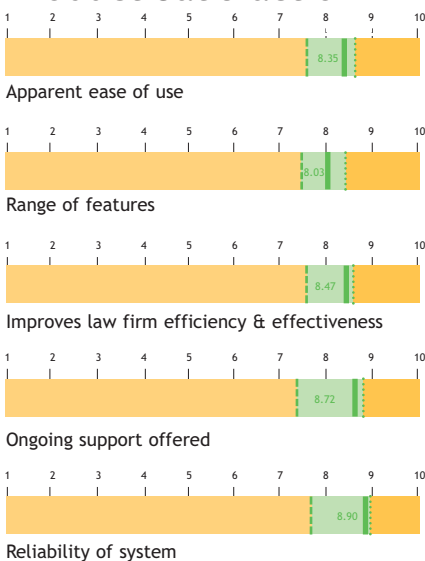
Product Performance Market research results



The Importance/Performance Ratio is a visual representation of each provider's performance on a range of product and company attributes in the context of what's important to the legal profession more generally.

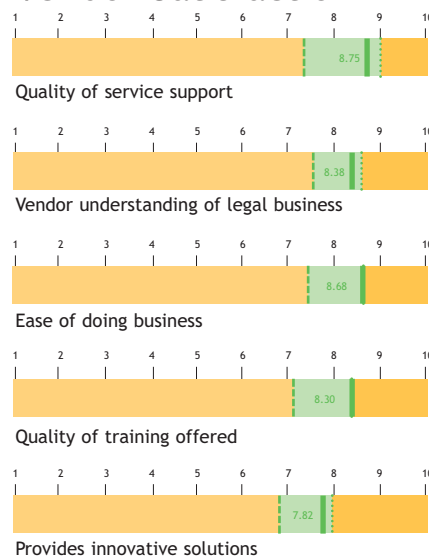
Attributes that score towards the right are perceived to be very important by the legal profession; those that score towards the left are perceived to be of much less importance. Scoring more towards the top right-hand corner is desired.

Product Satisfaction



LOWEST | THIS PRODUCT | HIGHEST

Vendor Satisfaction



Panel Analysis

Access impressed the panel with 'a comprehensive range of services for the small to medium/high street sized firm'. In market research Access scored top for training, top for support, and top for making sure that law firms are getting maximum benefit their system, acknowledged the panel. The panel also liked the introduction of time recording when out of the office on a laptop, and the use of SMS (text messaging) as a productivity feature, especially for the smaller practice with the ability to text warnings of upcoming appointments to clients, for example. Implementation of LSC Tables also impressed. The panel thought Access's user interface could do with a slight review, and was disappointed that the system relies on a law firm's document editor for versioning. But business continuity and disaster recovery needs are covered, with users 'encouraged' to back up daily and verify, and Access offers spare hardware for users who need emergency equipment and an offsite Internet backup service.

Product Pricing (Average cost per seat)

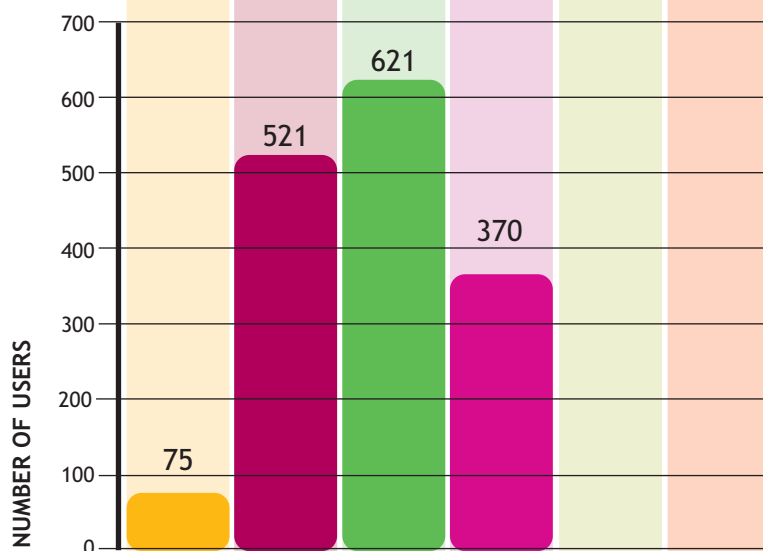
ACCESS PRACTICE MANAGEMENT

Number of Users	1	5	20	40	75	
Cost per seat (includes)	£3670	£1744	£961	£833	£722	
Software Installation (days)	0	1	2	2	3	
Project Management (days)	0	0	0	0	0	
Training (days)	2	5	9	15	20	
Annual Maintenance/Support Charge	£670	£1410	£3300	£5040	£8150	
Maintenance included in year 1	✓	✓	✓	✓	✓	

User Base

ACCESS PRACTICE MANAGEMENT

		1-5	6-20	21-40	41-75	75+	Top 100
Total firms 94	FIRMS	24	40	23	7	-	-
Total users 1587	USERS	75	521	621	370	-	-



ACCESS PRACTICE MANAGEMENT

	1-5	6-20	21-40	41-75	75+	top 100
ACCESS PRACTICE MANAGEMENT	✓	✓	✓	✓	✓	✗
	1-5 Solo/Very Small 1-5 Users	6-20 Small High Street 6-20 Users	21-40 Medium High Street 21-40 Users	41-75 Larger High Street 41-75 Users	75+ Commercial and Regional Firms 75+ Users	top 100 City and Major Regional Firms Top 100+ Firms

Managing Director's Statement



GEORGE FOWLER
Managing Director

We have been developers of software for the legal profession for the past 28 years. The wealth of experience this has imbued in our staff is reflected in the high regard in which our users hold our support services. We are pleased to congratulate our staff - many of whom have been with us for longer than they would care to remember - for a first class set of results in the guide for training and support services and for the continuity which they have provided to our clients over the years.

At the heart of our Practice Management System (PMS) is a single Sybase SQL database supporting fully integrated applications for legal accounting, time recording, case management and general database functionality. The integrity and resilience inherent in the SQL database ensures that our users experience maximum possible availability of applications.

Developments this year have seen the implementation of facilities to support the LSC bulk claims on line system; facilities to capture time away from the office; the release of statistical data accumulated throughout the life of the database to enable the production of bespoke reports and graphs; and further sophistication of the .NET Internet enabled access to our PMS.

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1-5

6-20

21-40

41-75

75+

✗

Independent View

AlphaLAW

AlphaLAW offers two practice management systems: Esprit, aimed at small firms with single-digit numbers of users, and Vantage, useful for firms ranging from small and medium-sized firms all the way up to the top 100 slot.

As with many of the software vendors in this year's Guide, AlphaLAW has concentrated on ensuring that both Esprit and Vantage are compliant with the latest LSC requirements for legal aid practice.

Workflow

AlphaLAW has spent considerable development time adding to the intelligence and functionality of the case management workflow designer in Vantage. As well as workflows for repetitive volume work, such as conveyancing, personal injury and family decrees, the company has tackled some esoteric areas, such as shipping law, by developing workflows in conjunction with customers.

Workflows can, for example, generate and send emails and SMS (text messages) to clients and third parties, with the firm's house-style for outbound documents automatically applied. The tools to build workflows have been made more visual and easy to use so solicitors - rather than programmers - can, should they wish, build new workflows from templates.

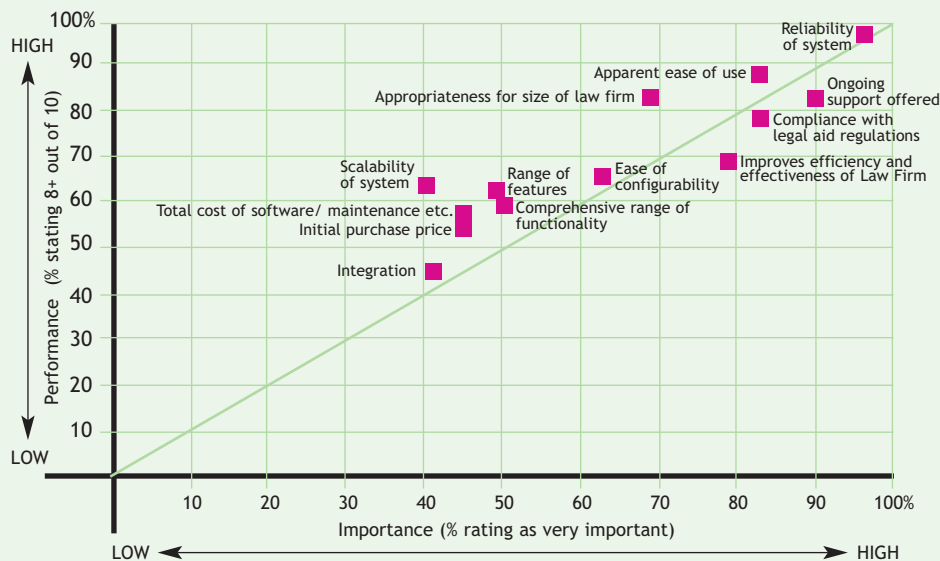
Service links

The need to automate case procedure has also led AlphaLAW to integrate links with third-party services, such as SDLT.co.uk for Land Tax returns and URU identity and credit checking services required by anti-money laundering regulations.

Efficiency

The efficiency demanded of firms by the new legal aid regime is spreading to all forms of legal practice. As firms involved in volume case work seek to delegate cases to less-qualified fee-earners, workflow automation modules, such as those in Vantage, will become more prevalent and finely tuned.

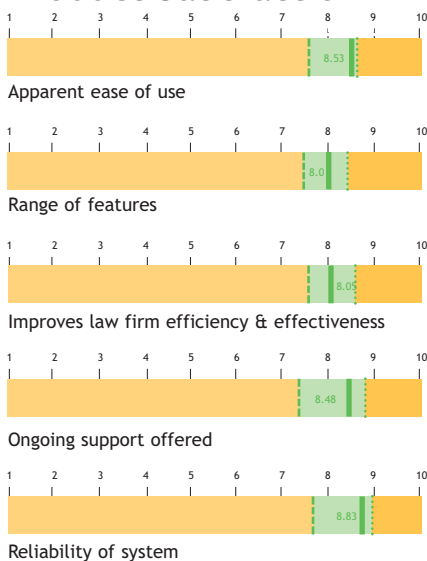
Product Performance Market research results



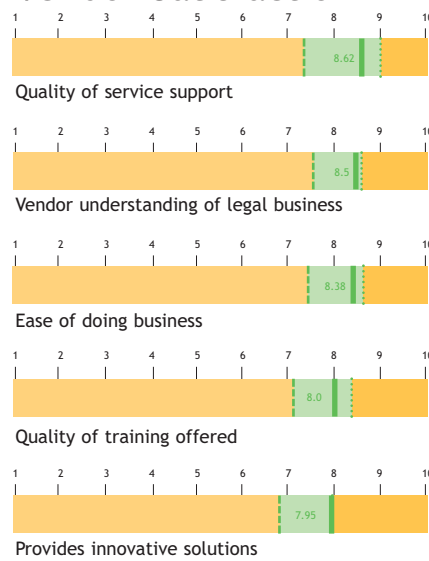
The Importance/Performance Ratio is a visual representation of each provider's performance on a range of product and company attributes in the context of what's important to the legal profession more generally.

Attributes that score towards the right are perceived to be very important by the legal profession; those that score towards the left are perceived to be of much less importance. Scoring more towards the top right-hand corner is desired.

Product Satisfaction



Vendor Satisfaction



LOWEST | THIS PRODUCT | HIGHEST

Panel Analysis

AlphaLAW impressed the panel with its case definition business logic, an emphasis on understanding the profession, e.g. legal office experience for all post-sales staff, its dashboard, which showed its balanced scorecard thinking, and a 'feature-rich and well-thought-through design, comparable with systems designed for larger practices'. This allows a good workflow configuration tool to allow non-IT staff to configure the system, the monitoring of KPIs (key performance indicators), caseloads and tasks, all through a 'very well-designed user interface'. The panel liked AlphaLAW's 'good approach to business continuity planning' and impressed with its 'ability to link client care activities visibly into workflows and matters'. The only areas the panel thought AlphaLAW could pick up on was in development of HR elements, which they say have not often been asked for.

Product Pricing (Average cost per seat)

ALPHALAW VANTAGE

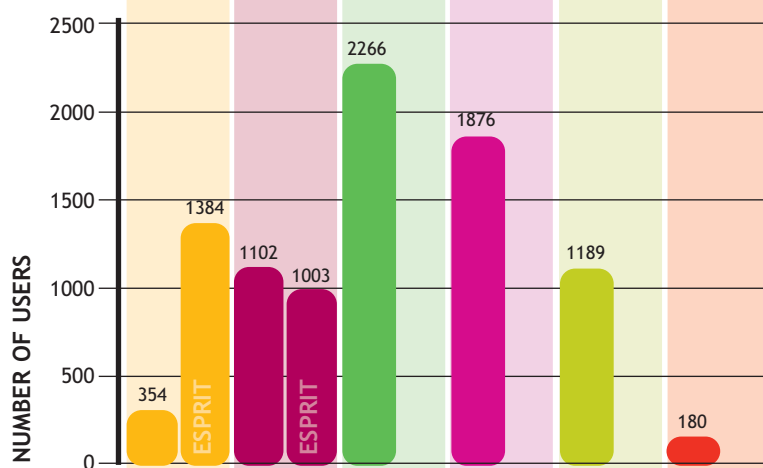
Number of Users	1	5	20	40	75
Cost per seat (includes)	£4150	£1460	£884	£793	£740
Software Installation (days)	0	1	2	3	4
Project Management (days)	0	0	2	3	5
Training (days)	2	3	5	10	18
Annual Maintenance/Support Charge	£788	£1224	£2859	£5039	£8854
Maintenance included in year 1	-	-	-	-	-

ALPHALAW ESPRIT

Number of Users	1	5	20	40	75
Cost per seat (includes)	£1770	£689	-	-	-
Software Installation (days)	0	1	-	-	-
Project Management (days)	0	0	-	-	-
Training (days)	1	2	-	-	-
Annual Maintenance/Support Charge	£467	£823	-	-	-
Maintenance included in year 1	-	-	-	-	-

User Base

ALPHALAW VANTAGE		1-5	6-20	21-40	41-75	75+	Top 100
Total firms 408	FIRMS	119	136	94	46	12	1
Total users 6967	USERS	354	1102	2266	1876	1189	180
ALPHALAW ESPRIT		1-5	6-20	21-40	41-75	75+	Top 100
Total firms 881	FIRMS	760	121	-	-	-	-
Total users 2387	USERS	1384	1003	-	-	-	-



ALPHALAW VANTAGE	✓	✓	✓	✓	✓	✓
ALPHALAW ESPRIT	✓	✓	✗	✗	✗	✗

1-5

Solo/Very Small
1-5 Users

6-20

Small High Street
6-20 Users

21-40

Medium High Street
21-40 Users

41-75

Larger High Street
41-75 Users

75+

Commercial and
Regional Firms
75+ Users

top 100

City and Major
Regional Firms
Top 100+ Firms

Managing Director's Statement



SIMON MEEHAN
Managing Director

AlphaLAW has long been recognised as the number one supplier of legal software solutions for law firms and it is enormously satisfying to see that our efforts have been consistently recognised by our clients and the Law Society.

Research carried out on behalf of the Law Society shows again that AlphaLAW is one of the top performers in all categories. This also provides a good indication that we have implemented further improvements in our software solutions to take law firm's satisfaction levels to a new high which is reflected in our rating again as the number one provider.

Our top rating for innovative solutions is another reason why law firms choose AlphaLAW, along with products that are easy to use and our customer-focused approach, which creates lasting relationships with our customers well beyond the initial software sale.

If you are looking to update your software system, then put AlphaLAW at the top of your list and see for yourself why we are consistently rated so highly in the Law Society Software Solutions Guide and more importantly by our clients.

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Email: tamos@alphalaw.com

Independent View

Cognito

While Cognito has kept its software up to speed with the LSC changes, compatible with the Solicitors Accounts Rules and Code of Conduct requirements, and streamlined processes to make working easier and quicker, until now the interface design has not been updated significantly. Cognito has therefore been rejuvenating the user interfaces of its packages to make them more productive, intuitive and easier on the eye. Productivity benefits embodied in more recent interfaces can now be realised.

New face

For example, using the previous version of PracticeManager, a team leader would have to actively search for information to see what a particular fee-earner should be doing at any one time. Now information from PracticeManager's accounts system can be used to prompt the fee-earner to do specific tasks, or can even be used to drive his entire day.

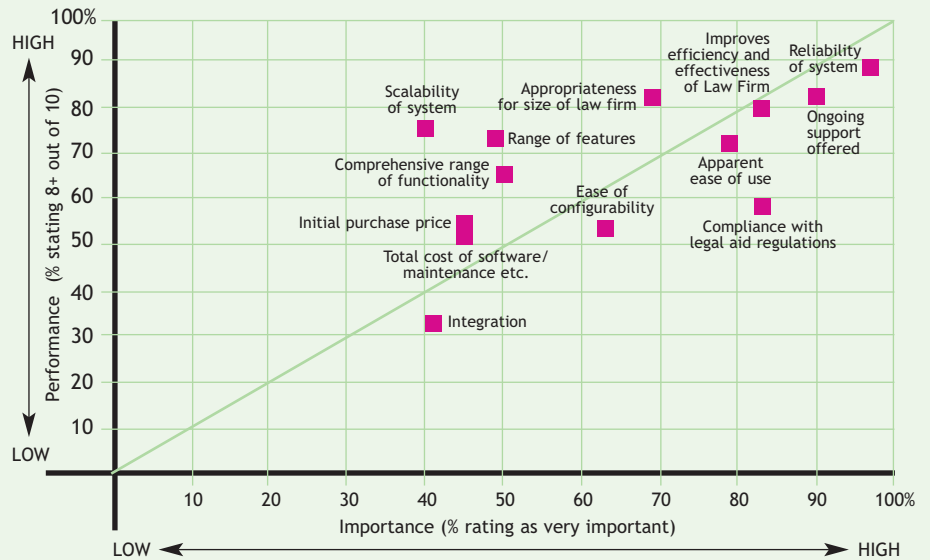
View from the web

Cognito has also enabled firms to post more detail of cases to a website so progress can be seen by clients. Matters can be exposed to clients in two ways - the firm hosts a web server, or Cognito hosts it and charges on a per-matter basis. Either way, making more case information available to clients online is the way forward for most law firms.

The software now includes integrations with online services, such as Postcode Anywhere, SDLT.co.uk and Callcredit for identity checking.

Upcoming developments will include a portion of PracticeManager's SQL database devoted to storing partner interests and staff details, so conflict checking can extend beyond client-client conflicts to include conflicts between prospective clients and all relationships in the firm. This kind of conflict check extension needs to become the norm throughout the legal IT world.

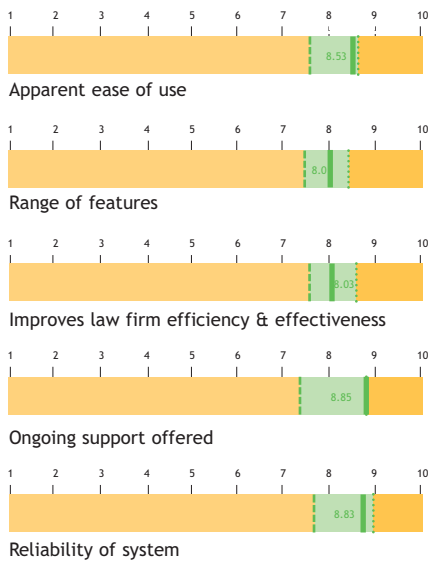
Product Performance Market research results



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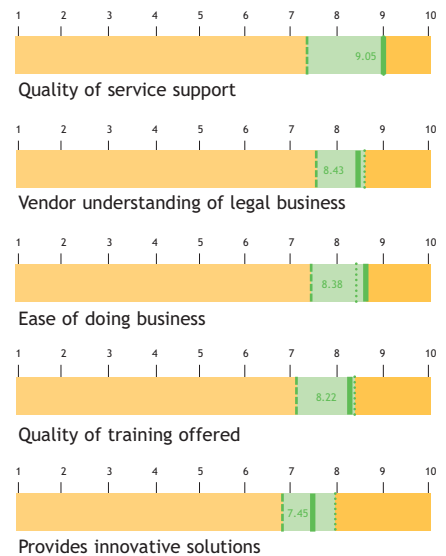
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Product Satisfaction



LOWEST | THIS PRODUCT | HIGHEST

Vendor Satisfaction



Panel Analysis

Cognito has pulled its socks up if the panel's views are anything to go by this year. The firm's efforts to update the user interface with the introduction of a new version of the 'fee-earner view', due early 2008, has built-in daily, weekly, monthly and annual KPIs at fee-earner level for WIP, billed time and outstanding debt, which impressed. Also mentioned in dispatches were the 'traffic-lights' indicators of recorded chargeable time given to fee-earners, as well as Cognito's approach to development, which has led Cognito to build a cut-down version of case management in Word and Outlook for smaller firms that the panel thought 'simple and quite elegant'. More problematic to the panel were: a lack of cashflow functionality in the current version; limited version control (though at least Word is not relied upon); the inability to email from outside the system; no matter-level security to protect or limit access to sensitive matters, and a reliance on Crystal reports. These points will be addressed in 2008, however, says Cognito.

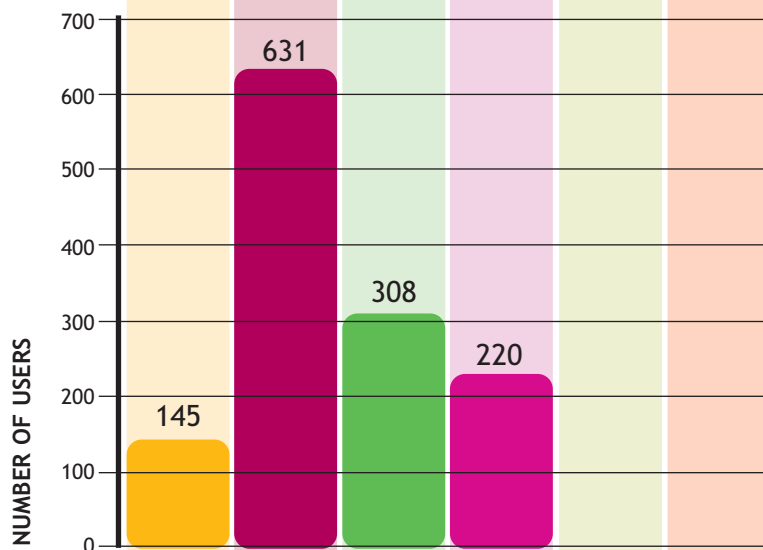
Product Pricing (Average cost per seat)

PRACTICE MANAGER

Number of Users	1	5	20	40	75	
Cost per seat (includes)	£3155	£1510	£841	£755	£708	
Software Installation (days)	1	1	1	1	2	
Project Management (days)	0	1	2	3	3	
Training (days)	2	3	6	10	15	
Annual Maintenance/Support Charge	£579	£1412	£2380	£4760	£7280	
Maintenance included in year 1	✓	✓	✓	✓	✓	

User Base

PRACTICE MANAGER		1-5	6-20	21-40	41-75	75+	Top 100
Total firms	FIRMS	54	46	10	4	-	-
Total users	USERS	145	631	308	220	-	-



PRACTICE MANAGER	✓	✓	✓	✓	✓	✗
	1-5	6-20	21-40	41-75	75+	top 100
	Solo/Very Small 1-5 Users	Small High Street 6-20 Users	Medium High Street 21-40 Users	Larger High Street 41-75 Users	Commercial and Regional Firms 75+ Users	City and Major Regional Firms Top 100+ Firms

Managing Director's Statement



ROBERT PIPER
Managing Director

We are absolutely delighted with the outstanding results we have achieved in the independent customer research carried out on behalf of the Law Society for this guide.

Achieving first place for Overall Customer Satisfaction is testament to our whole approach to business in dealing with our customers. We scored very highly in the areas of support, training and ease of use, which is a credit to and recognises the continuing efforts of our professional team of staff.

Cognito Practice Manager was designed by solicitors for solicitors and as such offers a wide range of functionality as standard, including auditing, risk management, document management, email and full reporting in a robust system. This is complemented by a comprehensive range of fully integrated case management solutions comprising Conveyancing, Debt Collection, Employment, Family, Personal Injury and Trust and Probate.

Our aims are to continue to offer our customers constructive advice and affordable, focussed solutions. We want to be recognised not only as a software supplier, but more importantly as a solution provider to the legal profession.

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Independent View

DPS Software

As with other software vendors, DPS has ploughed development effort into ensuring that the software complies with the Carter reforms, especially for criminal contracting and very high-cost cases.

One Office, three faces

It is to the look and feel of its case management element - One Office - that DPS has made the most radical changes. The case management tools can be accessed from a choice of three interfaces: Microsoft Outlook, as a Microsoft SharePoint application and via a web browser interface.

Once the initial setting up of fee-earners and their rates has been done in the application, all the functionality of the product is available in any of the three different interfaces. The aim is to minimise training and help users feel comfortable with the system.

The Outlook version, says DPS, enables the entire matter management to be conducted in Outlook whilst still optionally integrating the phone system, digital dictation and full document text searching.

Links and HIPs

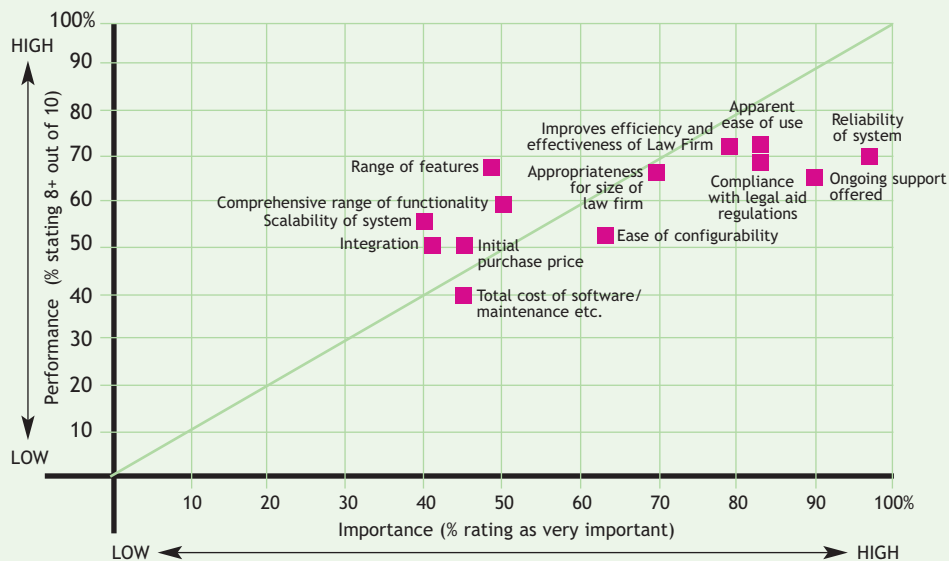
Other developments include built-in links to MoveWithUs.co.uk, the Land Registry and XIT2 to improve the efficiency of volume conveyancing and remortgaging work.

Like other vendors, DPS has developed a HIP production tool in its conveyancing case management module that keeps all incoming and outgoing documents for the case so they can be compiled into one HIP PDF and put on the web for downloading.

Pay As You Go

In line with moves by several other vendors in the Guide, DPS has now introduced a new pricing model for its system where firms pay a monthly subscription fee that includes all upgrades.

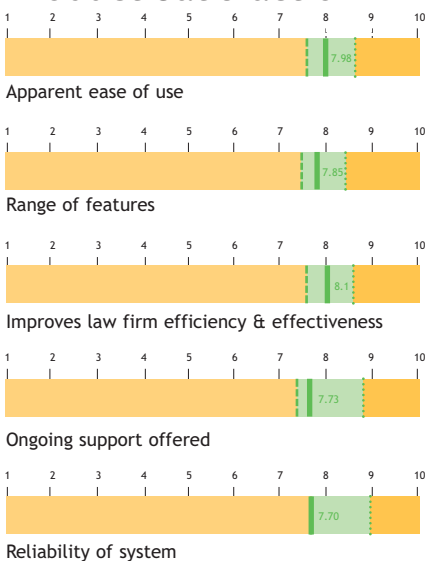
Product Performance Market research results



The Importance/Performance Ratio is a visual representation of each provider's performance on a range of product and company attributes in the context of what's important to the legal profession more generally.

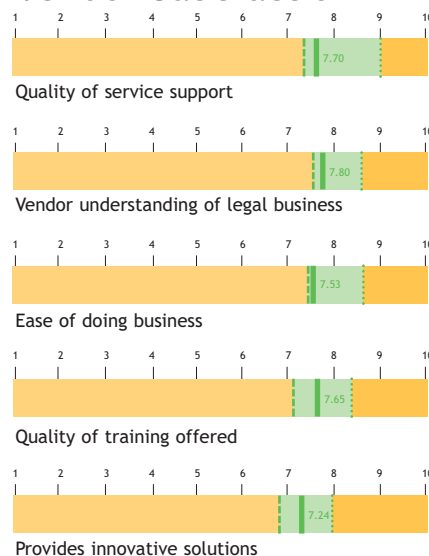
Attributes that score towards the right are perceived to be very important by the legal profession; those that score towards the left are perceived to be of much less importance. Scoring more towards the top right-hand corner is desired.

Product Satisfaction



LOWEST | THIS PRODUCT | HIGHEST

Vendor Satisfaction



Panel Analysis

Integration and automation impressed the panel when DPS came to see them. DPS isn't the only firm to use a 'dashboard' for KPIs, but the interface and ability to undertake multiple tasks on matters from within Outlook seemed 'very slick'. The system can also generate integrated dictation against matters or a particular document, which showed 'good integration'. Also liked were automatic trapping of outgoing emails from Outlook and automatic chasing of emails ('excellent', according to one panel member), integration with phone systems to allow information about callers to connect with time recording and case management, and 'very configurable' screens. DPS showed no 'standard' cashflow forecasting reports, which are now mandatory, but initial forecast reports are built as part of the setting up on-site, says DPS. Overall the system was 'very intuitive to use', said the panel, mainly because of its use from Outlook. DPS is another firm now convinced that presenting a 'single' window into a PMS is the way forward, with Outlook the preferred route.

Product Pricing (Average cost per seat)

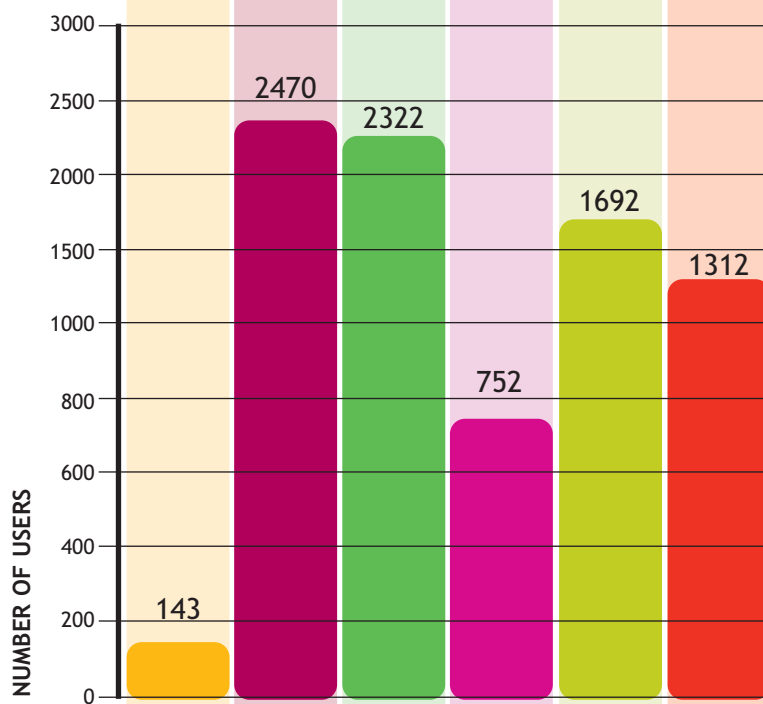
DPS SOFTWARE

Number of Users	1	5	20	40	75	
Cost per seat (includes)	£3300	£2040	£1200	£900	£600	
Software Installation (days)	1	1	1	1	2	
Project Management (days)	0	0	0	0	0	
Training (days)	3	5	8	20	36	
Annual Maintenance/Support Charge	£300	£1,400	£3,800	£4,840	£8,200	
Maintenance included in year 1	✓	✓	✓	✓	✓	

User Base

DPS SOFTWARE

		1-5	6-20	21-40	41-75	75+	Top 100
Total firms 412	FIRMS	83	174	117	19	15	4
Total users 8691	USERS	143	2470	2322	752	1692	1312



DPS SOFTWARE

	✓	✓	✓	✓	✓	✓
	1-5	6-20	21-40	41-75	75+	top 100
	Solo/Very Small 1-5 Users	Small High Street 6-20 Users	Medium High Street 21-40 Users	Larger High Street 41-75 Users	Commercial and Regional Firms 75+ Users	City and Major Regional Firms Top 100+ Firms

Managing Director's Statement



OSMAN ISMAIL
Managing Director

'One Office' from DPS brings together all the key functions in a practice by offering a virtual communications centre for the fee earners and secretaries. The product seamlessly integrates Email, Phone, Digital Dictation, Scanned Mail, Internet, Case Management and of course Accounts. Users of the system have ready to use starter workflows for all major legal areas, including property Purchase, Sales, HIPs, Personal Injury and Medical Negligence, Family, Criminal and General Litigation work. The Crime module includes full CDS and Crown Court billing functionality plus practice, branch, department and individual key performance indicators that are delivered in real time to the individual's desktop 'dash board'.

Uniquely the DPS product is available as an Outlook add-in that allows users to launch Outlook and gain access to all of their practice and case management applications, whilst in the email/message centre. This gives all users a familiar working environment that encourages use of all aspects of the software.

Finally the case management and accounts systems are also accessible through a web browser allowing clients, work providers and home workers secure access from wherever they are, at any time.

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Independent View

Eclipse Legal Systems Proclaim®

This year sees the full roll-out of Proclaim® version 3, with a user interface that looks similar to Outlook.

Outlook favourable

Going with the Outlook 'look' is becoming the norm now that Microsoft has tied up the user-facing side of the legal market. In the case management modules there is now a document preview pane similar to Outlook's, so a user can flick through each line of the case history and preview the documents without opening or printing them. This means you have quicker access to information and is a great boon when, for example, discussing a case on the phone.

The link between case management and accounts has also been enhanced so users can look into one from inside the other, making for a more unified PMS.

Gathered at the HIPs

A new document collation tool allows the user to select documents from the matter file and collate them into one paginated PDF document - a useful feature for producing HIPs and court bundles.

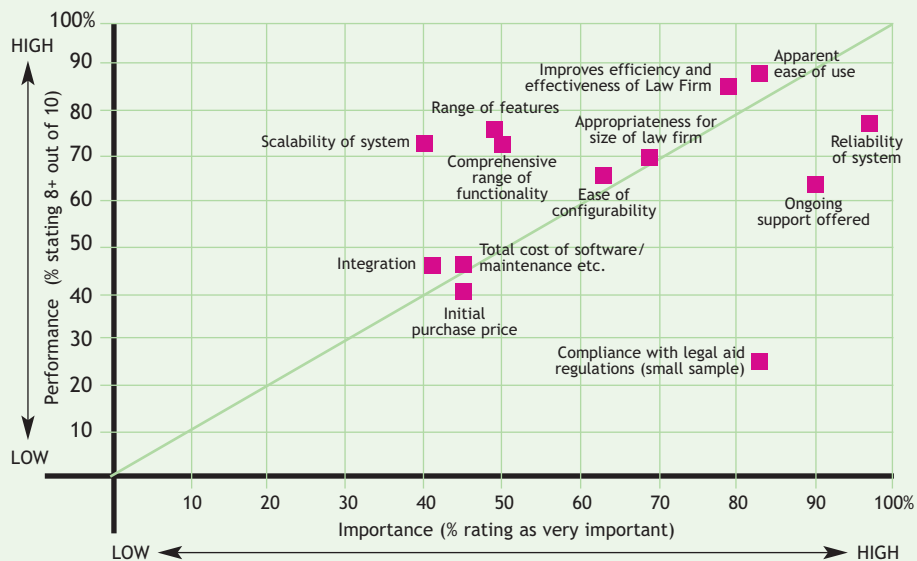
Online self-service

Many PMSs now allow clients to view matters online in some way. Eclipse has taken this a step further and allows clients to enter details on the web to initiate a case. These are automatically pulled into the case management system, the initial documents are created and sent, letters to third parties are generated and the matter allocated to a case handler. The process keeps running until it needs human intervention.

Volume conveyancing firm Barnett's operates a similar process using Proclaim®. The system accepts the case online, produces the documents, sets timescales, generates reminders for the case handler and escalates reminders if they go unheeded.

Obviously a lot of law firms won't need that level of automation, but in future more automation will be needed than many firms realise. This level of automation needs control, so Eclipse provides a wide range of training courses and options to help firms tailor and create workflows themselves.

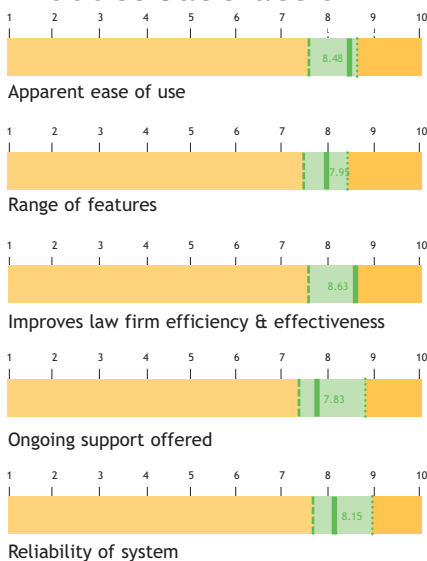
Product Performance Market research results



The Importance/Performance Ratio is a visual representation of each provider's performance on a range of product and company attributes in the context of what's important to the legal profession more generally.

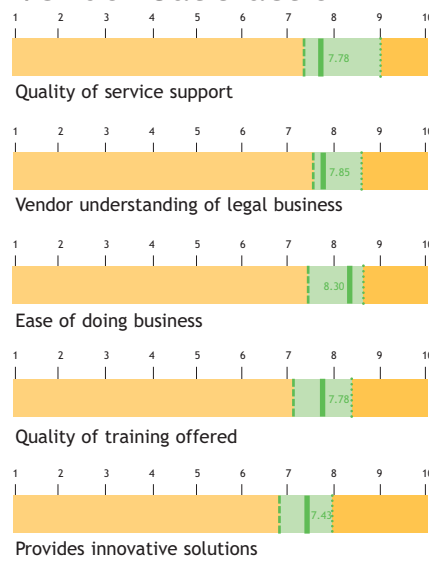
Attributes that score towards the right are perceived to be very important by the legal profession; those that score towards the left are perceived to be of much less importance. Scoring more towards the top right-hand corner is desired.

Product Satisfaction



LOWEST | THIS PRODUCT | HIGHEST

Vendor Satisfaction



Panel Analysis

Eclipse's new Outlook-style user interface impressed the panel, as did the bundling tool that creates PDF files and can select documents for bundling from a set of rules created by the user. This tool can also 'top and tail' bundles to produce professional-looking HIPs, for instance, which the panel liked. Customer relationship management (CRM) functionality is also 'very good' and CRM history can be turned on and off at matter level, something the panel also liked. The panel was also impressed with Eclipse's 'speed and flexibility' and the system's 'highly configurable security'. On the downside, Eclipse was another vendor to be interviewed that disappointed the panel on cashflow forecasting with a 'lack of functionality'. However, a cashflow tool is due in mid-2008 as a free add-on.

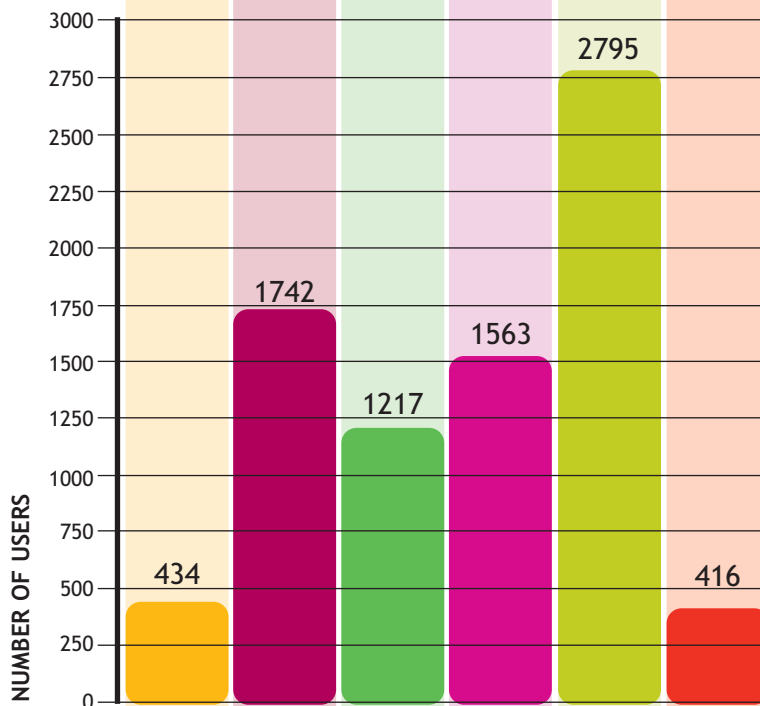
Product Pricing (Average cost per seat)

PROCLAIM®

Number of Users	1	5	20	40	75
Cost per seat (includes)	£2850	£1810	£1399	£1200	£1200
Software Installation (days)	1	1	2	5	5
Project Management (days)	1	1	1	1	1
Training (days)	2	2	5	11	21
Annual Maintenance/Support Charge	-	-	-	-	-
Maintenance included in year 1	-	-	-	-	-

User Base

PROCLAIM®		1-5	6-20	21-40	41-75	75+	Top 100
Total firms 382	FIRMS	132	134	48	33	26	9
Total users 8167	USERS	434	1742	1217	1563	2795	416



PROCLAIM®	✓	✓	✓	✓	✓	✓
	1-5	6-20	21-40	41-75	75+	top 100
	Solo/Very Small 1-5 Users	Small High Street 6-20 Users	Medium High Street 21-40 Users	Larger High Street 41-75 Users	Commercial and Regional Firms 75+ Users	City and Major Regional Firms Top 100+ Firms

Managing Director's Statement



RUSSELL THOMSON

Sales Director

STEVE OUGH

Technical Director

The past year has seen continued growth and success here at Eclipse Legal Systems.

Highlights include:

- A total of 71 new clients brought onboard in our 2007 financial year
- 50% of all new sales originating from referral and word-of-mouth
- An end-user count in excess of 8,000
- Record turnover and profit levels

Testament to our ongoing dedication in providing true value and innovative solutions for our clients is our performance in this year's Software Guide: Eclipse is ranked number 1 in the following categories: 'Client commitment', 'Likelihood to recommend the system to another practice or solicitor', 'Improving efficiency and effectiveness' and 'Professionalism of sales approach'.

By taking the time to ask our clients what they want - and ensuring that we meet and exceed their expectations - our Proclaim® software solution has gained an unsurpassed reputation for functionality, ease of use and flexibility.

Proclaim®'s structure ensures that we can provide a solution to work 100% around your requirements. Whether you're looking for an 'out-of-the-box' package, standalone case management, a tailored business process management system, or a fully integrated practice management solution, Proclaim® will meet your needs and continue to grow and evolve in line with them.

Work areas catered for include: conveyancing, remortgage, personal injury, debt recovery, financial claims, employment, family/matrimonial, crime and probate.

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Contact 2

Russell Thomson

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Independent View

Iris Connected

The last year has seen Iris Connected, previously Mountain Software, rolling out a new SQL and .NET-based version of its integrated PMS system to existing customers. Iris Connected's change of database from FoxPro to SQL makes the product more scalable and therefore more applicable to a wider range of firms.

Reporting

Development effort has concentrated on reporting and data mining. The Cubes tool used to query the FoxPro database has been replaced by Report Builder, which queries the SQL database.

The previous pop-up dashboard has been replaced by a more powerful and configurable dashboard, with a web frontend. Users can drop in various parameters and graphs to show, say, costs, WIP, files open etc. In this way firms can create individual profiles, each showing different information, to deliver only relevant information to each fee earner or team.

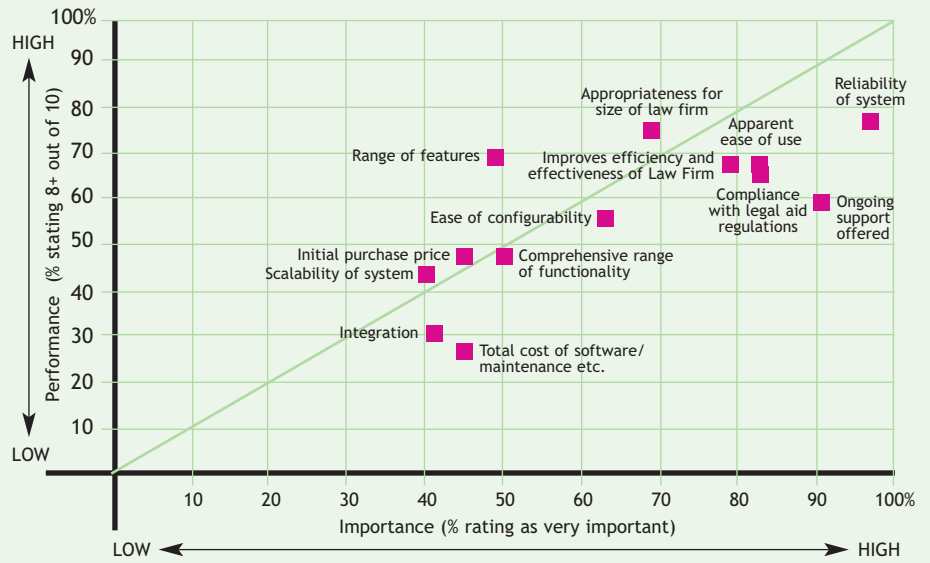
A graphical tool has been added to show how close a case is to its fixed fee ceiling - operating like a petrol gauge - which can be seen from time recording or financial enquiries screens.

Time out of time

The time spent recording time has been reduced with features like a favourites menu against which the fee-earner can quickly log time and a cloning feature which allows a fee-earner to take a frequent sequence of operations - say, email, letter, phone-call and clone them for each matter, adjusting the time spent as required.

There is so far no integration with online ID-checking services, but Iris Connected's owner, Iris Software, is planning to use the same online identity checking integration used elsewhere in the group.

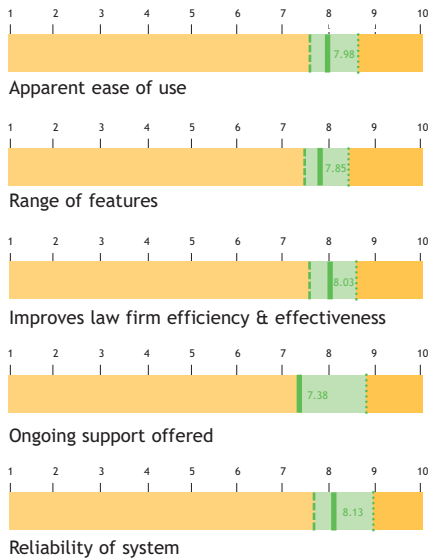
Product Performance Market research results



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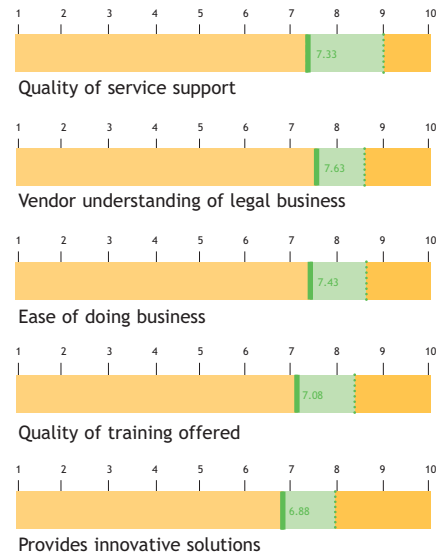
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Product Satisfaction



LOWEST | THIS PRODUCT | HIGHEST

Vendor Satisfaction



Panel Analysis

Iris Connected's software has a 'well-thought out' user interface, integrated HR elements including CPD tracing, skills and holidays and absence, and built-in scanning and archiving functions that the panel really liked. Also in the plus column were internal messaging to support cross-functional processes, built-in basic document versioning, a 'good' digital dashboard and Connected's use of a 'traffic lights' system for alerting users to case issues. Iris Connected failed to impress the panel with the graphics on the fee-earner console, a seeming lack of attention to anti-money laundering, and seemingly only very basic cashflow forecasting. But Connected's system for the assessment of risk level is 'good'. One panel member noted that 'a lot of additional features normally suggested as add-ons by suppliers are included within their systems', a worthy point to note.

Product Pricing (Average cost per seat)

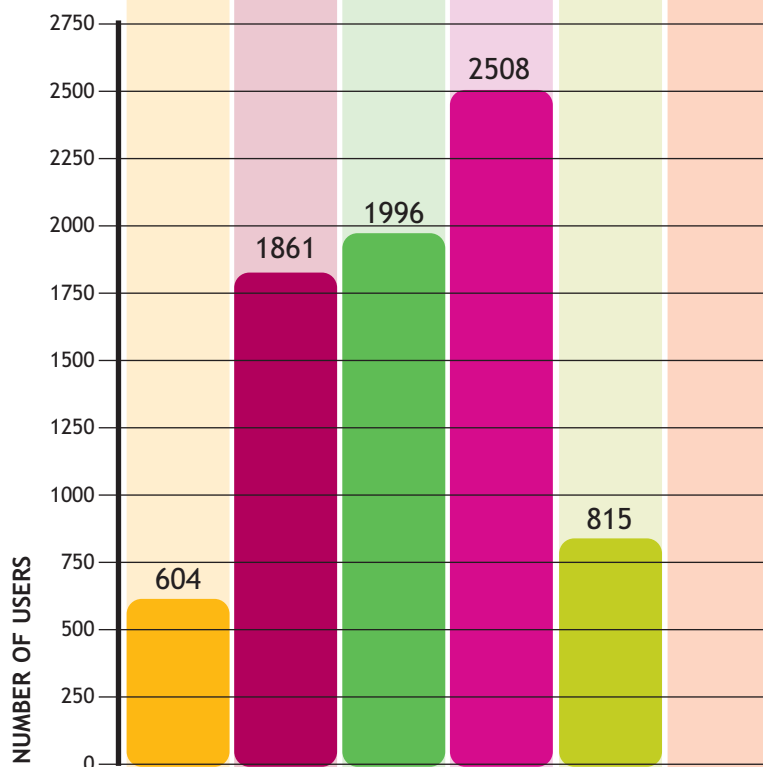
IRIS CONNECTED PMS & ACCOUNTS & TIME RECORDING

Number of Users	1	5	20	40	75
Cost per seat (includes)	£2825	£1385	£1145	£938	£840
Software Installation (days)	0	0.5	1	2	3
Project Management (days)	0	0.5	1	2	3
Training (days)	2	3	9	14	23
Annual Maintenance/Support Charge	£850	£1255	£2780	£4560	£7425
Maintenance included in year 1	-	-	-	-	-

User Base

IRIS CONNECTED PMS & ACCOUNTS & TIME RECORDING

		1-5	6-20	21-40	41-75	75+	Top 100
Total firms 540	FIRMS	223	167	90	49	11	-
Total users 7784	USERS	604	1861	1996	2508	815	-



IRIS CONNECTED PMS & ACCOUNTS & TIME RECORDING

Category	1-5	6-20	21-40	41-75	75+	top 100
IRIS CONNECTED PMS & ACCOUNTS & TIME RECORDING	✓	✓	✓	✓	✓	✗
	Solo/Very Small 1-5 Users	Small High Street 6-20 Users	Medium High Street 21-40 Users	Larger High Street 41-75 Users	Commercial and Regional Firms 75+ Users	City and Major Regional Firms Top 100+ Firms

Managing Director's Statement



ARLENE ADAMS
Managing Director

The last twelve months have seen the continued roll-out of our SQL-based IRIS Connected product to the user base. Available as a FREE software upgrade to existing Mountain customers, the new Connected solution built entirely in .NET offers increased scalability coupled with greater user definability.

Connected features a new 'digital dashboard' incorporating quick access to KPI's and tasks as well as access to all files. Improvements across the board in document management, reporting, CRM, marketing, accounts, time recording and a new HR module, IRIS Connected also brings the added financial flexibility of a 'hosted solution' that can grow and evolve with your firm.

A strong product within the IRIS Legal Solutions portfolio, IRIS Connected also benefits from the collective development resource pool, for example integration with the other complimentary IRIS products such as Laserform.

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Independent View

IRIS Evolution

Iris Evolution, previously AIM's Evolution InSight, is an integrated PMS and case management system with a SQL database, accounts, case plans, document production, time recording, billing and KPI reporting.

Templates

Case management software generally sits on a continuum that runs from the generic, which can be bent to almost any case, to 'out-of-the-box' tools which can be used in one way only. Iris Evolution is in the middle, providing templates, e.g. for conveyancing or personal injury, which customers modify themselves.

Twin-track

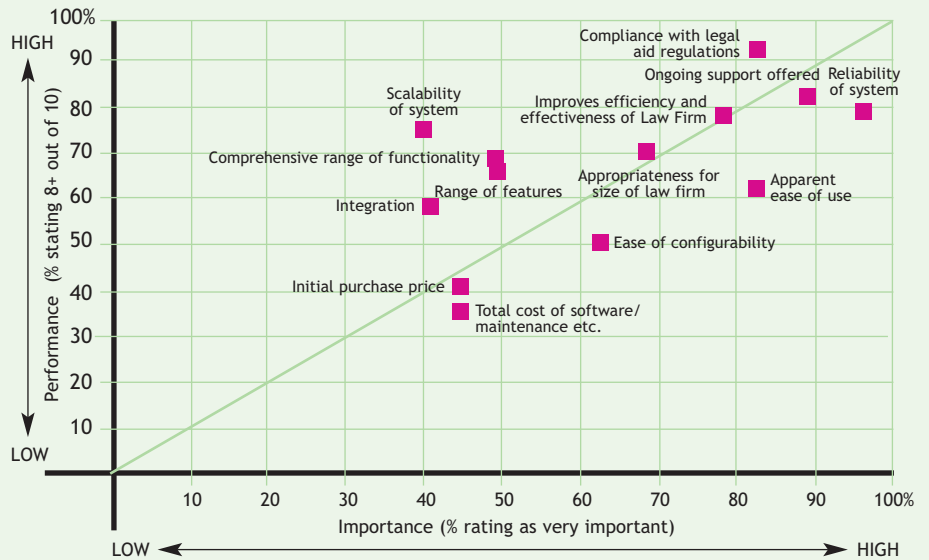
About 15% of Evolution's customers do legal aid work, so the company's development programme follows a twin-track path: ensuring the software complies with the latest LSC changes (which Evolution has done) and providing a better corporate-focused product. For other firms, Iris Evolution's philosophy is to be less of an out-of-the-box product and more of an integration hub for third-party services.

Document management

An example of how this works out in practice is evidenced by Evolution's approach to document management (DM). Rather than develop its own DM workflow, or expect firms to invest in a dedicated DM system such as Hummingbird, the web services layer in Evolution will take advantage of the DM features on Microsoft SharePoint (part of Microsoft's server operating system). Examples of where this shows itself are in version control and comparison, content and circulation management, search and linking content with metadata.

This should provide a DM system that is a natural part of the legal software, not an add-on. This is the route towards integrated front-office applications down which Iris Evolution's owner, Iris Software, is taking all its legal IT companies.

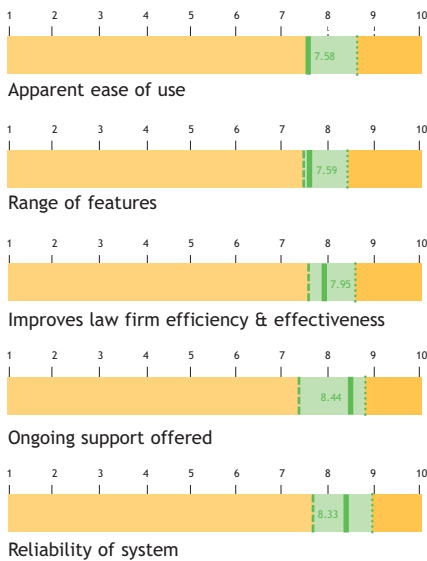
Product Performance Market research results



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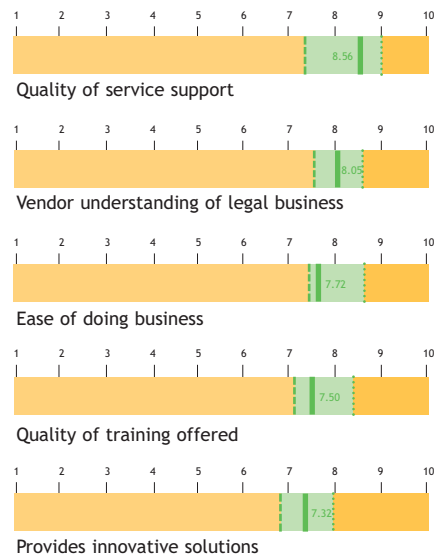
Attributes that score towards the right are perceived to be very important by the legal profession; those that score towards the left are perceived to be of much less importance. Scoring more towards the top right-hand corner is desired.

Product Satisfaction



LOWEST | THIS PRODUCT | HIGHEST

Vendor Satisfaction



Panel Analysis

The Guide's panel has, over the years, come to the conclusion that automating compliance is a huge benefit of PMSs. So Iris Evolution scored well with the panel this year on a couple of key issues that law firms face in 2008: compliance with anti-money laundering regulations and conflict checking, and risk assessment. Panel members noted that Evolution had 'amongst the best AML integration' of the suppliers seen, that it forces a client ID before files can be opened, and also noted their satisfaction with Evolution's risk assessment capabilities. Downsides ran to a lack of document control, what the panel felt was a slightly plain interface, and only 'marginal' cash-flow and budget variance offerings. But in the plus column was Evolution's 'very flexible security system', solid integration with Outlook and Word, 'amongst the best' online capabilities 'with particular strengths in document handling and reporting', 'excellent' legal aid capabilities and practice support on legal aid, and a 'good' alert system as fees increase.

Product Pricing (Average cost per seat)

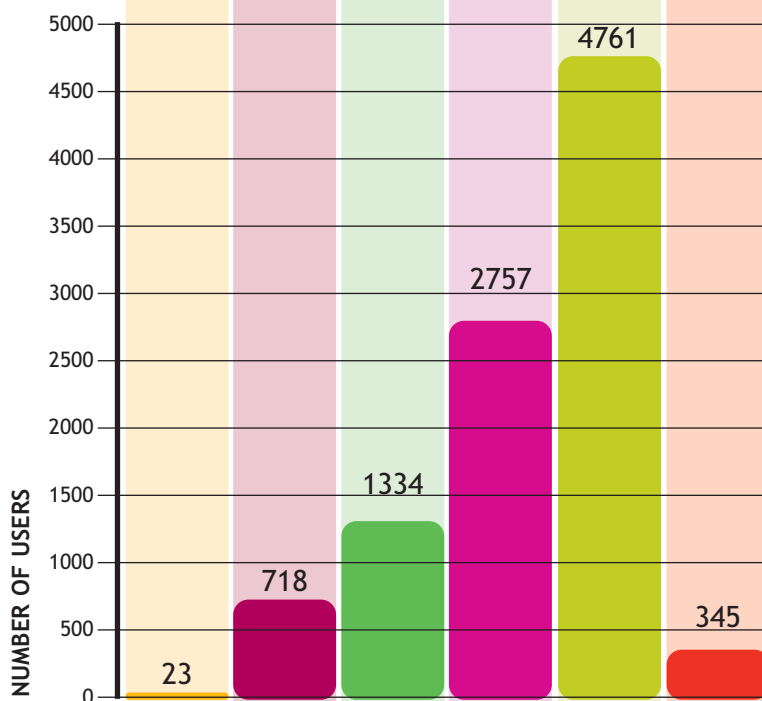
EVOLUTION

Number of Users	1	5	20	40	75	
Cost per seat (includes)	-	£2200	£1400	£1200	£1000	
Software Installation (days)	-	1	2	3	6	
Project Management (days)	-	2	3	5	7	
Training (days)	-	7	14	22	24	
Annual Maintenance/Support Charge	-	£1200	£3200	£5200	£9000	
Maintenance included in year 1	-	-	-	-	-	

User Base

EVOLUTION

		1-5	6-20	21-40	41-75	75+	Top 100
Total firms 207	FIRMS	6	63	48	49	39	2
Total users 9938	USERS	23	718	1334	2757	4761	345



EVOLUTION

	✓	✓	✓	✓	✓	✓
	1-5	6-20	21-40	41-75	75+	top 100
	Solo/Very Small 1-5 Users	Small High Street 6-20 Users	Medium High Street 21-40 Users	Larger High Street 41-75 Users	Commercial and Regional Firms 75+ Users	City and Major Regional Firms Top 100+ Firms

Managing Director's Statement



ARLENE ADAMS
Managing Director

IRIS Evolution continues to focus on delivering first class services and products to clients. During 2007 considerable effort has been put in to developing and improving customer service which has concluded in great results shown in this year's customer research.

The Evolution team scored highly in 'Quality of service support' and 'Ongoing support offered' and top in 'Compliance with legal aid requirements' - where the team were quick to update the clients software in line with the changing requirements. Coming 2nd out of 16 suppliers, and number one in 'Improvement year on year' is strong evidence that the hard work has paid off.

Development in the product continues to move forward with the launch of IRIS Document Management for Legal based on Microsoft Windows SharePoint Services, embedded within Evolution. Client Connect.Net, is an extension to the Document Management solution and opens the way for secure exchange of documents with clients, referrers and collaborating teams and practices.

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Independent View

Iris Legal Office

Iris Legal Office returns to the Guide this year, after a period of absence when it was still called Videss, under new ownership.

All in one

Iris Legal Office v10 has been rewritten as a single product and will be distributed to existing customers for free. Iris Legal Office has a Progress licence in perpetuity, so there are no charges for Progress-based v10 customers.

The rewrite means that the advanced functionality of the system - such as integration with digital dictation and scanning - is more readily available to users rather than buried deep in menus, which tends to happen as software is incrementally upgraded.

A version that works with Lotus Notes, an equivalent to Microsoft Exchange, is also available.

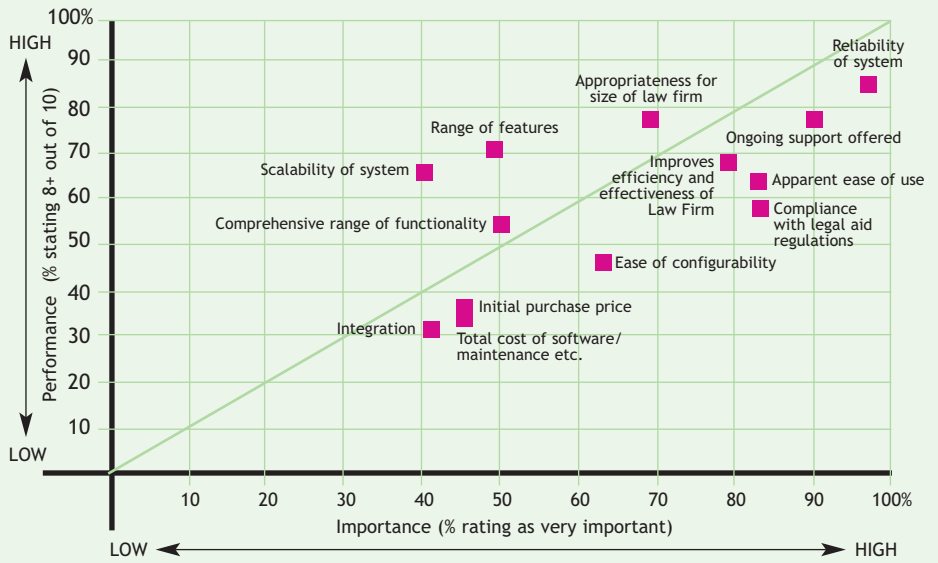
Automation everywhere

Legal Office v10 extends the ability to automate workflows beyond case management and into accounting, support and marketing functions.

As with other legal software vendors, Iris Legal Office has made liberal use of XML (the language that allows structured data to be shared between computer systems over the Internet more easily) to enable the import and export of documents to and from third-party web services, such as SDLT.co.uk.

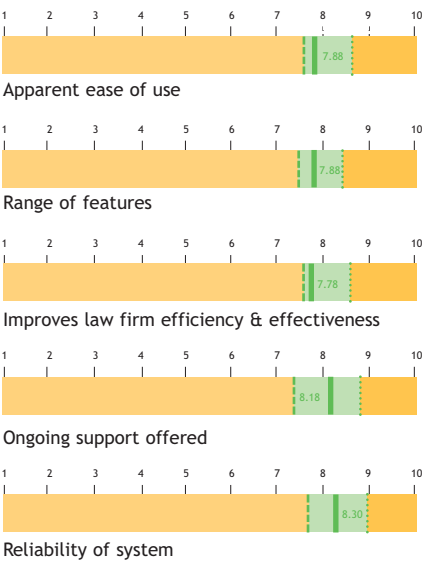
Iris Legal Office provides an XML toolkit so practice managers can write these import/export routines for themselves - assuming they can't find someone else to dump the work on. Either way, this means practices can respond to requests from clients to adopt e-business methods at the pace they choose, rather than waiting for Iris Legal Office to write routines for them.

Product Performance Market research results



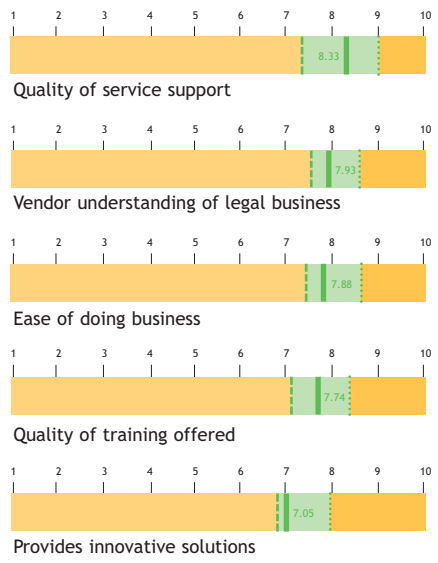
The Importance/Performance Ratio is a visual representation of each provider's performance on a range of product and company attributes in the context of what's important to the legal profession more generally. Attributes that score towards the right are perceived to be very important by the legal profession; those that score towards the left are perceived to be of much less importance. Scoring more towards the top right-hand corner is desired.

Product Satisfaction



LOWEST | THIS PRODUCT | HIGHEST

Vendor Satisfaction



Panel Analysis

Fresh-faced to this year's panel, Iris Legal Office did well, presenting what one panel member thought was the 'the most comprehensive package I have seen, with answers for every area and question raised'. Legal Office has a good eye for workflowing case management, and its system allows for computer-telephony integration that allows telephone calls by clicking on contacts, for example. Document bundling, scanning straight to matters, a 'clean unfussy interface' and built-in customer relationship management (CRM) with 'good' functionality all impressed the panel, as did Legal Office's document versioning, a regular panel bête noir. Legal Office's digital dashboard, which many suppliers now seem to offer, is 'very well implemented and, crucially, fully configurable at the user level'. Legal Office's user interface also appealed to the panel, as did the company's 'excellent' cashflow forecasting, a truly unusual accolade for the panel to award.

Product Pricing (Average cost per seat)

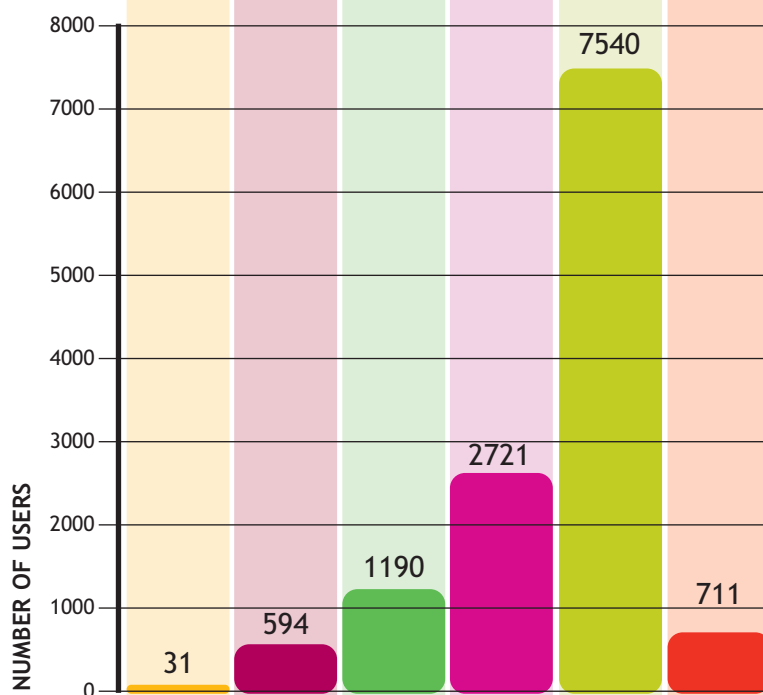
LEGAL OFFICE

Number of Users	1	5	20	40	75	
Cost per seat (includes)	-	£2000	£1500	£1250	£1000	
Software Installation (days)	-	1	1	2	3	
Project Management (days)	-	1	3	4	7	
Training (days)	-	5	12	16	25	
Annual Maintenance/Support Charge	-	-	-	-	-	
Maintenance included in year 1	-	-	-	-	-	

User Base

LEGAL OFFICE

		1-5	6-20	21-40	41-75	75+	Top 100
Total firms 189	FIRMS	11	45	37	47	49	1
Total users 12076	USERS	31	594	1190	2721	7540	711



LEGAL OFFICE

	1-5	6-20	21-40	41-75	75+	top 100
LEGAL OFFICE	✓	✓	✓	✓	✓	✓
	Solo/Very Small 1-5 Users	Small High Street 6-20 Users	Medium High Street 21-40 Users	Larger High Street 41-75 Users	Commercial and Regional Firms 75+ Users	City and Major Regional Firms Top 100+ Firms

Managing Director's Statement



ARLENE ADAMS
Managing Director

After a short absence I am pleased to propose the IRIS Legal Office product to the Law Society's Guide.

Founded in 1977 Videss is now part of the sixth largest UK software company, IRIS. The combination of a long-serving team, experienced in delivering practice and case management systems to lawyers and the backing of a large and financially stable company has huge benefits for customers.

IRIS Legal Office offers true business process management by integrating all aspects of traditional practice and case management through user defined workflows.

As a cornerstone of the IRIS Legal Solutions portfolio, Legal Office is leading the way in integrated legal solutions, winning the Legal Technology Awards' Integrated System of the Year for the past two years.

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- 1-5
- 6-20
- 21-40
- 41-75
- 75+
- Top 100

Independent View

JCS Computing Solutions

Aimed at small firms, Legal Ledger is a tightly integrated suite comprising modules for accounts, time recording, case management, a customer relationship management database and WebCase, which enables firms to publish matter milestones and documents online.

Smooth HIPs

A new development this year is a web-based HIPs automation function which enables an estate agent to log on to a firm's website and begin the conveyancing process by requesting a HIP and specifying which documents are required. This request is downloaded to the case management system, which sends off the Land Registry search automatically. The resulting documents are uploaded to the web for agents to access and the HIP is compiled and routed via the fee-earner to the agent.

Increasing automation

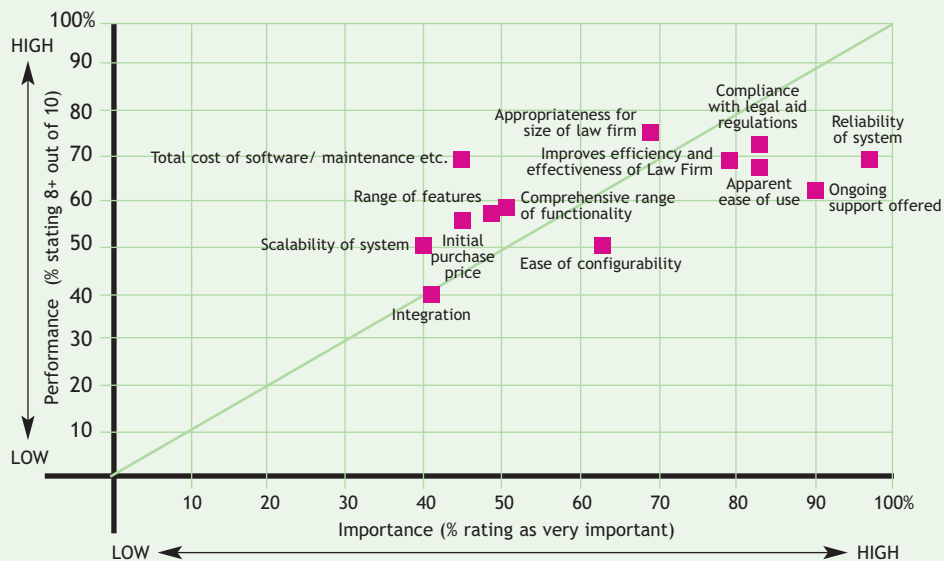
Inside Legal Ledger JCS has embedded a number of automated and semi-automated processes that boost the efficiency of fee-earners and support staff. For example, scanned documents for anti-money laundering checks are attached to the client and matter automatically. Individual steps on the workflow are automated so that on exchange, say, letters are generated automatically and automatic searches post a disbursement to the ledger.

Archive

Legal Ledger's archiving facility enables all case documents to be archived to whatever storage medium the firm chooses (JCS champions DVD-RAM because it suffers less from longevity issues). Once archived, a case can be accessed on a read-only basis, or it can be brought back 'live' to CasMan, but date-stamped as to when it was archived and when reinstated.

As one would expect with JCS's customer profile of small firms, a lot of development effort has been expended on ensuring the software is ready for the new LSC changes in legal aid.

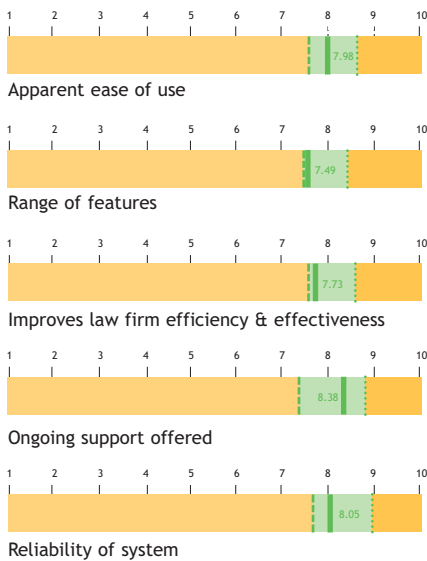
Product Performance Market research results



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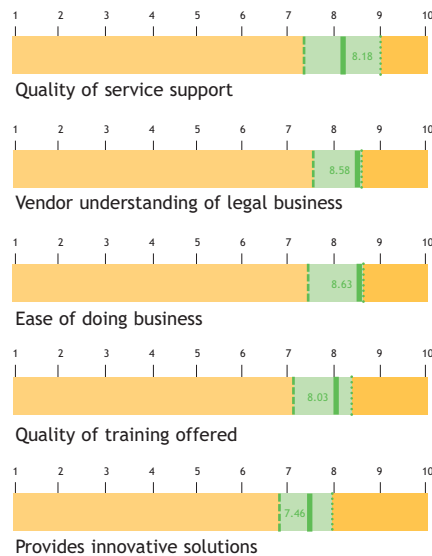
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Product Satisfaction



LOWEST | THIS PRODUCT | HIGHEST

Vendor Satisfaction



Panel Analysis

JCS is a firm that has stayed close to its users, and this comes through in its market research and its software development. The firm has a new HIPs offering which is, thought the panel, 'sophisticated'. There is also now more functionality to navigate through the system, found the panel, and a fee-earner summary for daily timesheets. JCS's offering 'fills a niche in providing something for the smaller firms', said the panel. JCS works fundamentally for a market that might suffer most from the reforms currently in play, so anything that helps those clients, especially in automating processes to cut costs, will be welcome. In terms of 'look and feel' JCS's client base, traditionally conservative, will find Legal Ledger's 'classic Windows' interface comforting. JCS was, however, one of only two suppliers the panel saw to build in security to PDF bundles to prevent anything but printing and reading - a useful and innovative differentiator.

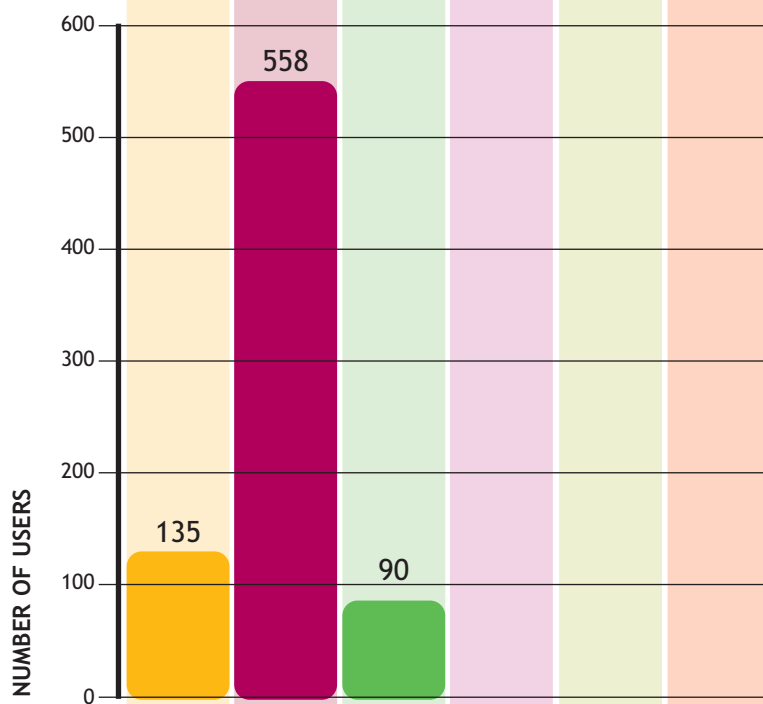
Product Pricing (Average cost per seat)

LEGAL LEDGER FILOS

Number of Users	1	5	20	40	75	
Cost per seat (includes)	£1680	£910	£750	£720	-	
Software Installation (days)	.5	1	3	5	-	
Project Management (days)	0	2	8	14	-	
Training (days)	.5	3	10	18	-	
Annual Maintenance/Support Charge	£492	£1080	£3000	£5600	-	
Maintenance included in year 1	✓	✓	✓	✓	-	

User Base

LEGAL LEDGER FILOS		1-5	6-20	21-40	41-75	75+	Top 100
Total firms 183	FIRMS	53	135	4	-	-	-
Total users 783	USERS	135	558	90	-	-	-



LEGAL LEDGER FILOS	✓	✓	✓	✗	✗	✗
	1-5	6-20	21-40	41-75	75+	top 100
	Solo/Very Small 1-5 Users	Small High Street 6-20 Users	Medium High Street 21-40 Users	Larger High Street 41-75 Users	Commercial and Regional Firms 75+ Users	City and Major Regional Firms Top 100+ Firms

Managing Director's Statement



**KERRY FRATER and
ROGER JACKSON**
Directors

Ten years ago, when the Software Solutions Guide first appeared, small to medium-sized practices were predominantly coming to terms with computerised accounting. Between 1992 (the introduction of five-weekly reconciliations) and 2000, the majority of law firms introduced computerised accounts for the first time. For many it was a traumatic and largely unwanted necessity. Now, those same firms would find it hard to contemplate life without computerised accounting.

History is repeating itself in the form of practice and case management systems. The days of implementing practice-wide IT solutions to create a competitive edge have gone; becoming a necessity for business equality, to survive, to meet current as well as future challenges.

Now, partners and fee-earners face the challenge of implementing and using new solutions not cashiers, but the process of cultural and technological change is similar to the nineties.

Legal Ledger FiLOS puts partners and fee-earners at the heart of practice and case management, just as cashiers have been at the heart of accounting for the past 17 years. And, a few years from now, firms who have chosen wisely, will wonder how they ever managed without practice and case management.

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1-5

6-20

21-40

✗

✗

✗

Independent View

Liberate

Linetime's Liberate comprises accounts and case management modules calling on a Microsoft SQL database. Modules are available separately allowing firms to choose the parts of the system that meet their current needs and budget.

Links outside

While Linetime adopted Microsoft's .NET development strategy some years ago, the benefits for its customers in terms of increased automation and efficiency are now being realised in the ability to link the PMS to external web entities: HMRC for Land Tax returns, Possessions Claims Online (PCOL) for possessions work, Nflow and BigHand for digital dictation, and CallML for anti-money laundering ID.

Links inside

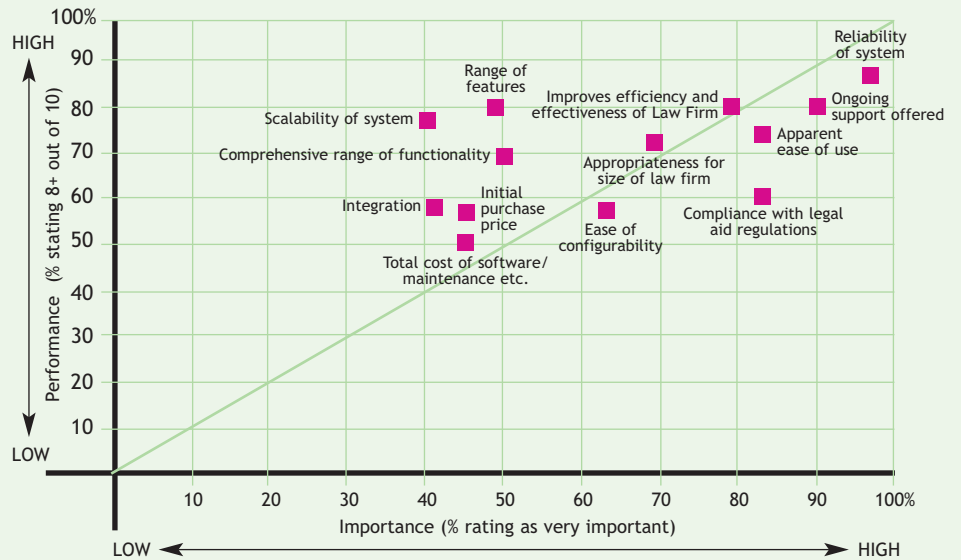
.NET also provides integration with other parts of Microsoft Office and SharePoint (Microsoft's server software for managing collaboration tasks). Linetime shares the view that SharePoint is evolving into a repository that will bring document management within the reach of smaller firms. For the law firm with an eye to a paperless future, an image router enables scanned hardcopies, such as correspondence and identity documents, to be stored automatically with the emails and file notes on the matter file.

Pay as you go

Burgeoning pay-per-transaction services such as CallML have changed firms' thinking about software, says Linetime. So the company offers per-transaction payment for all case modules, with uptake from customers in debt recovery, ESDLT and conveyancing.

For small firms without IT staff, Linetime can monitor and support systems remotely. This approach can also be a boon in terms of disaster recovery and/or business continuity, provided IT suppliers also have good DR/BC plans in place.

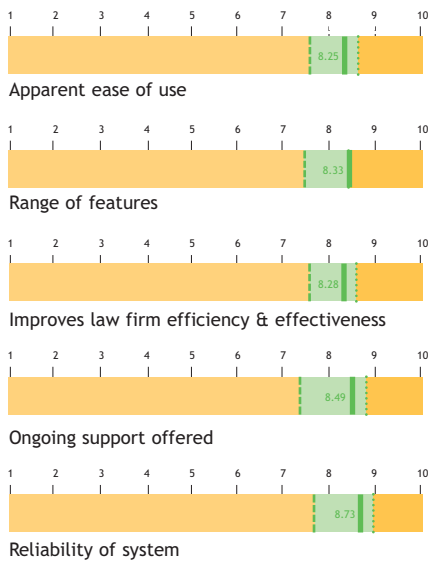
Product Performance Market research results



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Product Satisfaction



LOWEST | THIS PRODUCT | HIGHEST

Vendor Satisfaction



Panel Analysis

Linetime's early adoption of Microsoft's .NET architecture paid dividends both in terms of software development and panel happiness, with one panel member describing the firm as an 'excellent all-rounder' in exploiting it. Another panel member described Linetime's Liberate as their 'favourite', with the system's links to Possession Claims Online and connections to Revenue and Customs' website for SDLT, suggesting Linetime 'gets the web and e-government'. Linetime also gets compliance, with 'great' anti-money laundering integration, basic HR/customer relationship management functionality, an 'extensive range of online capabilities', 'very adequate' budget variance analysis and cashflow forecasting and a system that is 'highly configurable', said the panel. The only negatives mentioned were that this integration seemed limited when the product was used 'out of the box' (something most law firms would admittedly rarely do), a cautious approach to SharePoint adoption for document management and collaboration, and a user interface that was not quite at the cutting edge. In the round, however, Linetime impressed.

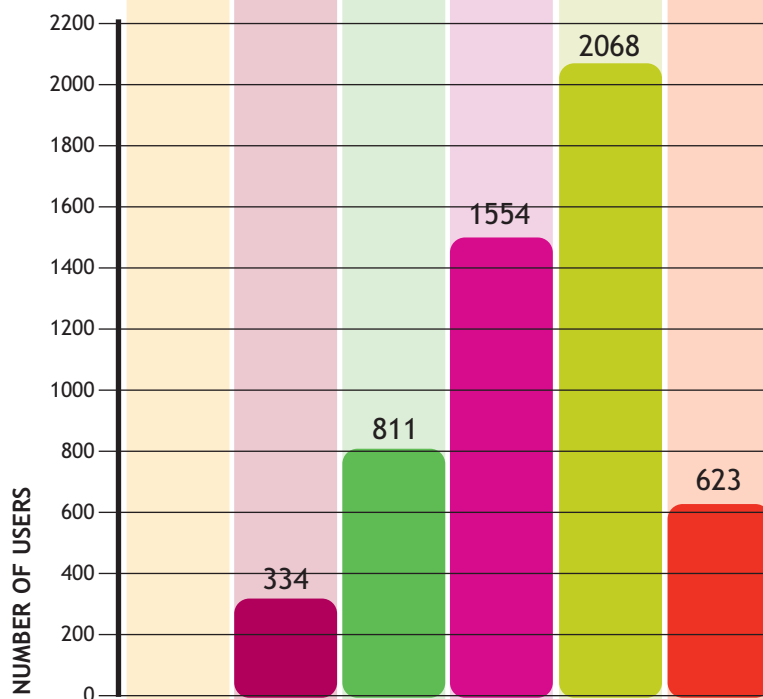
Product Pricing (Average cost per seat)

LIBERATE

Number of Users	1	5	20	40	75	
Cost per seat (includes)	-	£2200	£975	£825	£700	
Software Installation (days)	-	1	1	2	2	
Project Management (days)	-	1	1	2	2	
Training (days)	-	6	11	16	23	
Annual Maintenance/Support Charge	-	£1060	£2236	£4124	£6124	
Maintenance included in year 1	-	✓	✓	✓	✓	

User Base

LIBERATE		1-5	6-20	21-40	41-75	75+	Top 100
Total firms 123	FIRMS	-	34	35	37	16	3
Total users 5390	USERS	-	334	811	1554	2068	623



LIBERATE		1-5	6-20	21-40	41-75	75+	top 100
		✗	✓	✓	✓	✓	✓
		Solo/Very Small 1-5 Users	Small High Street 6-20 Users	Medium High Street 21-40 Users	Larger High Street 41-75 Users	Commercial and Regional Firms 75+ Users	City and Major Regional Firms Top 100+ Firms

Managing Director's Statement



TONY KLEJNOW
Managing Director

We are once again delighted with the market survey results. Rated first for range of features and second for initial purchase price marks Liberate as feature rich and competitively priced.

Our philosophy is to maintain a complete portfolio of software solutions. We have always targeted the core areas of functionality required by a practice. The addition of specialist functions ranging from compliance, client verification (assisting money laundering checks) right through to comprehensive CRM and a cost-effective paperless office ensures Liberate supports the most go ahead of practices.

Based around Microsoft technology and the .Net framework the solutions readily link with NLIS, SDLT, panel referrers and digital dictation etc. The support of web services ensures Liberate embraces the emerging world of web based collaboration.

Liberate is proven and robust. These qualities along with the rich functionality are the reason Liberate is a solution selected whether a practice has four or 400 users.

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X

6-20

21-40

41-75

75+

Top 100

Independent View

OP SIS

OP SIS's range of software is mostly bought by small and mid-sized firms (1-40 users) though it has the chops to handle also larger firms, with a handful on its books. The range includes Millennium Solo for sole practitioners, and Small Practice System for one-to-five users and for the larger firm, Millennium Accounts and PMS.

.NET

A sizeable proportion of the company's development for the last year has focused on transferring its software to Microsoft .NET programming tools and methodologies. .NET-based products will be delivered in the first half of 2008, offering among other capabilities improved remote access so fee-earners can be more productive working away from their desks.

OP SIS also provides a separate module called Weblink that lets clients and their agents track case progress online.

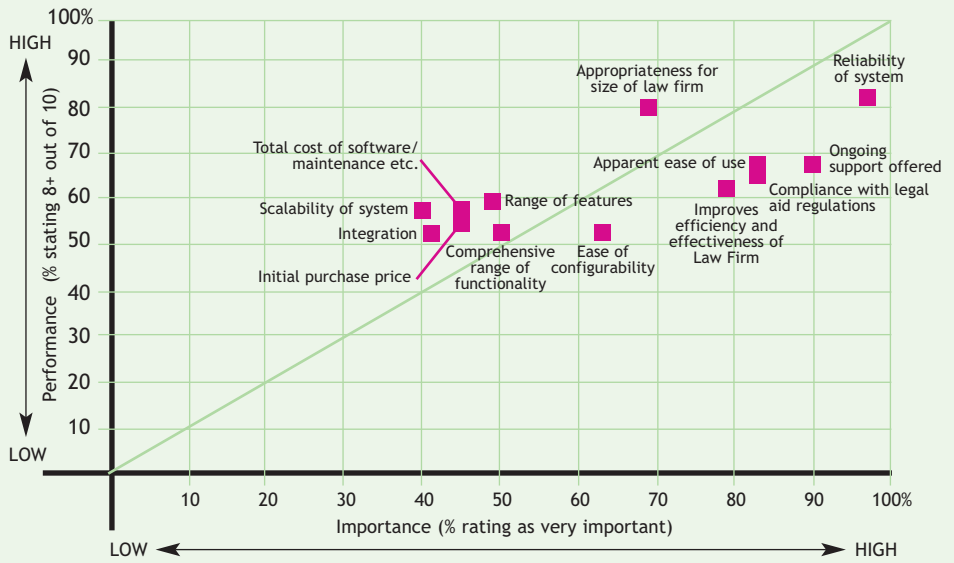
Code of Conduct

OP SIS has also reviewed its software to ensure it complies with the 2007 Solicitors' Code of Conduct. Complying with the new rules is, of course, non-negotiable, and building a firm's IT to efficiently force this compliance is a boon.

Web Ready

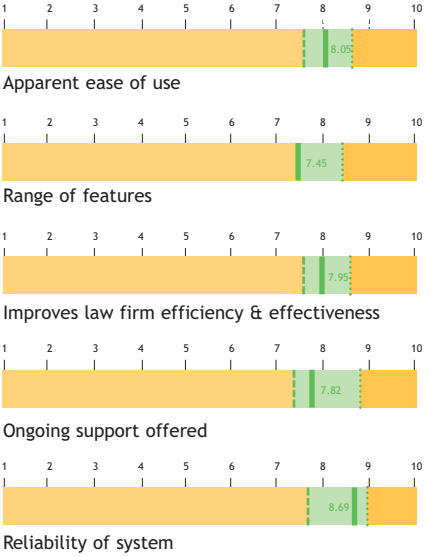
OP SIS has also been updating the customer support area of its website, so customers can log support calls and track progress, download the latest revisions of software, product manuals, 'how-to' sheets and access FAQs. There is also a user forum and knowledge base for self-service support. Letting customers 'pull' information down that they need is an increasingly popular method for support distribution.

Product Performance Market research results



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Product Satisfaction



Vendor Satisfaction



LOWEST | THIS PRODUCT | HIGHEST

Panel Analysis

Money laundering is a huge issue in this year's legal IT field and OP SIS scored with the panel as being 'ahead of the pack' on this. OP SIS's 'check-out' facility that allows fee-earners to work from home without risking network security impressed the panel, as did the company's attitude towards product development and its awareness of clients' needs in this post-Clementi world. Version control was limited and closing and archiving matters seemed cumbersome, thought the panel, and like several other vendors OP SIS's cashflow forecasting seemed absent. There also appeared to be room to improve in terms of support for disaster recovery. But the company has made improvements in email functionality, including better visual representation of when emails have been passed into case management, and the panel liked OP SIS's PDF builder - functionality that will most likely be impossible to do without in future. This bundle creation ranked a 'good' from the panel alongside 'good' security overall.

Product Pricing (Average cost per seat)

OP SIS PMS

Number of Users	1	5	20	40	75
Cost per seat (includes)	£4999	£1490	£1220	£870	£780
Software Installation (days)	1	1	2	3	5
Project Management (days)	2	2	2	3	5
Training (days)	3	3	10	18	30
Annual Maintenance/Support Charge	£800	£1200	£3245	£3980	£4950
Maintenance included in year 1	✓	✓	✓	✓	✓

OP SIS MILLENNIUM ACCOUNTS

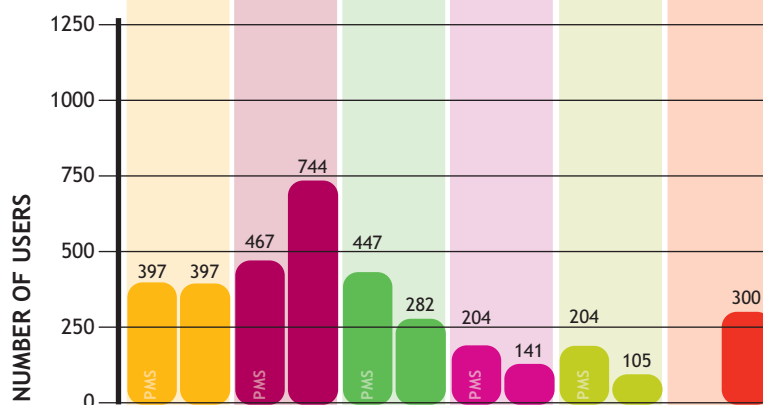
Number of Users	1	5	20	40	75
Cost per seat (includes)	£1800	£1200	£785	£700	£600
Software Installation (days)	1	1	2	3	4
Project Management (days)	-	-	-	-	-
Training (days)	1	2	5	10	15
Annual Maintenance/Support Charge	£480	£1000	£1750	£2500	£4500
Maintenance included in year 1	✓	✓	✓	✓	✓

User Base

OP SIS PMS		1-5	6-20	21-40	41-75	75+	Top 100
Total firms 99	FIRMS	35	42	17	4	1	-
Total users 1438	USERS	116	467	447	204	204	-

OP SIS MILLENNIUM ACCOUNTS

Total firms 306	FIRMS	218	72	11	3	1	1
Total users 1972	USERS	397	744	282	144	105	300



OP SIS PMS	✓	✓	✓	✓	✓	✗
OP SIS MILLENNIUM ACCOUNTS	✓	✓	✓	✓	✓	✓

1-5

Solo/Very Small
1-5 Users

6-20

Small High Street
6-20 Users

21-40

Medium High Street
21-40 Users

41-75

Larger High Street
41-75 Users

75+

Commercial and
Regional Firms
75+ Users

top 100

City and Major
Regional Firms
Top 100+ Firms

Managing Director's Statement



ELLA JENKINS
General Manager

An extremely busy year at OPSIS, with a record number of new customers joining us. We now have over 750 firms using our software. New customers include smaller start-up firms with just one-to-five users, and multi-site practices with hundreds of staff.

Our success in supplying such a wide spectrum is down to having a product for every type and size of law firm that not only meets their needs but matches their budget. Clients can also build upon their original system by adding additional modules and extra users as and when required ensuring their system expands with their business needs.

OP SIS' software goes beyond just accounts and case management. We see an important part of our role, as your software supplier, is to assist with other compliance areas such as the Solicitor's Code of Conduct and AML.

The Legal Services Bill will have a further impact on firm's requirements and we believe that our software will progress into a complete business management system designed to help firms compete in a new legal marketplace.

By selecting OPSIS as your software supplier you can rest assured that you will be investing in a technologically advanced package that will continue to meet your business needs now and in the future.

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1-5

6-20

21-40

41-75

75+

Top 100

Independent View

Quill

With Quill's Pinpoint the 'S' in PMS denotes service as much as it does system: Pinpoint is a bureau for small and medium-sized firms, providing client database, time recording, accounting, reporting, payroll, digital dictation transcription and disaster recovery. All firms need are PCs or Macs with broadband Internet access.

Quill is no longer the only online-only provider, but it has one of the longest track records.

The bureau model means practices can fulfil their SAR and LSC requirements without the capital expenditure, maintenance, training and upgrading burdens of buying their own system and without the potentially problematic issue of having to employ a legal cashier

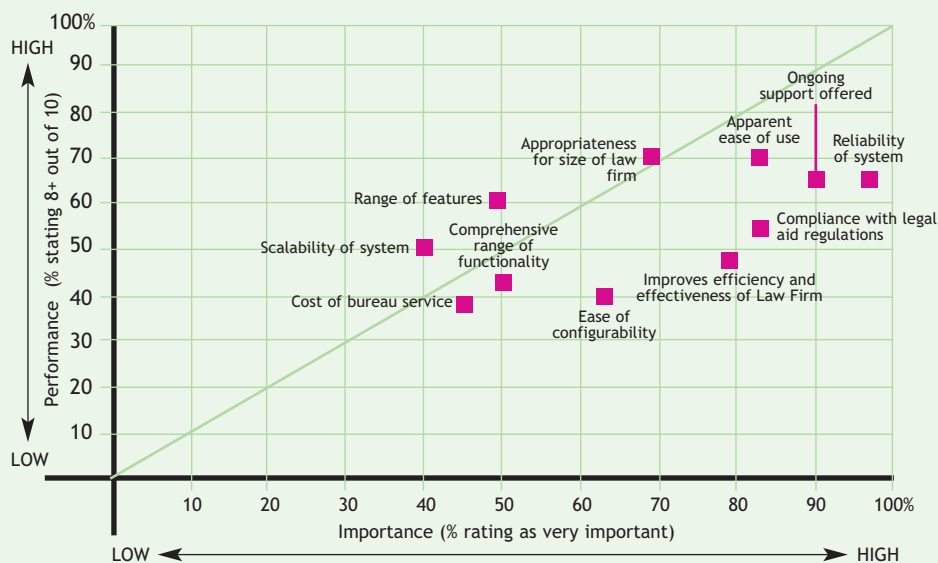
Recovery position

Quill took last year's panel point about the need for resilience and good disaster recovery for hosted solutions seriously indeed, and has entirely updated its datacentre. It has replaced the conventional server boxes with HP servers that are more reliable, easier to maintain, and less power-hungry. Quill has also opened a co-location centre, to which data is mirrored every day. Quill has also implemented a comprehensive disaster recovery plan for all areas of its business including voice and data communication. All these improvements would prove useful pointers to any law firm's own business continuity plans.

Pending cases

Although Pinpoint has no case management system, it can be integrated with any .NET developed web application, for which Quill favours OPSIS's case management system. However, Quill plans to augment Pinpoint with a case-management service using the same bureau model as for accounts. To be named Pinpoint Office, it will interact with Microsoft Outlook, Word and Excel.

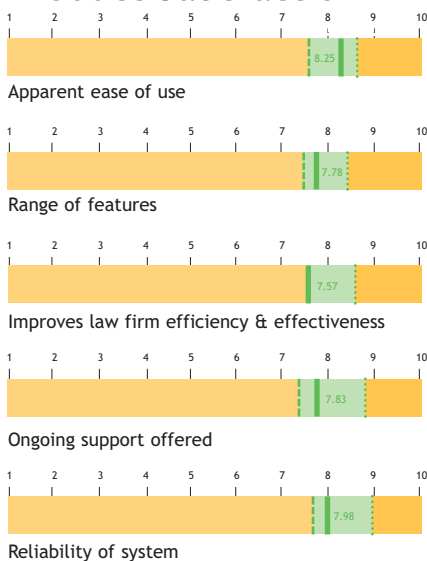
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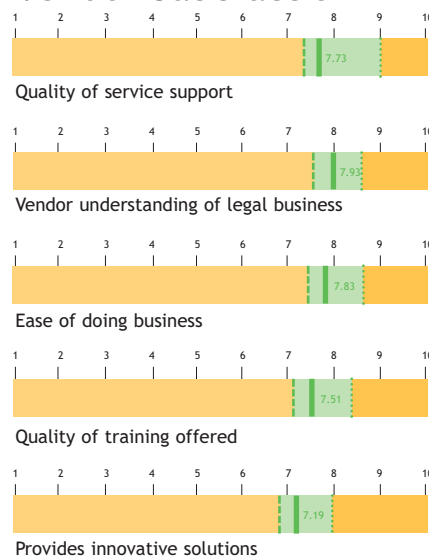
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Product Satisfaction



LOWEST | THIS PRODUCT | HIGHEST

Vendor Satisfaction



Panel Analysis

Quill looks to have pulled it out of the hat this year with the Guide's panel. Quill's offering scored plus points for its attractiveness for start-ups, its anonymised benchmarking and the company's training practice for accounts staff. Moving from a bureau service into being a web-based wider offering has allowed Quill to transform into a modern service - the application service provider. The web-based system imposes 'no overhead on the client's server' remarked the panel, and is also therefore 'totally mobile'. It is configurable by the fee-earner and/or managing partner to their own exact requirements, said the panel, and has a 'fantastic' report writer. Other positives were a 'very good' management information element, 'simple' document production and Quill seemed 'very on top' of the changes to legal aid. Month-end reports are now published online. All in all Quill has pushed the boat out in terms of progress, and it shows.

Product Pricing (Average cost per seat)

PINPOINT

Number of Users	1	5	20	40	75	
Cost per seat (includes)	£225/£375	£625	£1850	£2750	-	
Software Installation (days)	inc.	inc.	inc.	inc.	-	
Project Management (days)	-	-	1	1	-	
Training (days)	1	1	2	3	-	
Annual Maintenance/Support Charge	inc.	inc.	inc.	inc.	-	
Maintenance included in year 1	✓	✓	✓	✓	-	

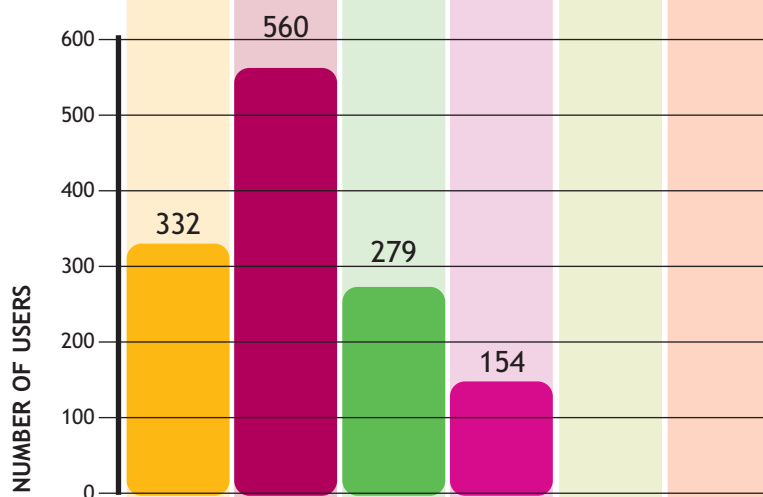
* The cost per seat illustrations above are actually monthly charges for the Pinpoint service and include transfer of opening trail balance information, on site training and remote installation. The number of users relates to the number of fee-earners within the practice.

There are no annual software maintenance fees for the Pinpoint service. The Pinpoint monthly charge is based upon the size of practice and type of work undertaken. The above figures are assuming a high street practice performing both contentious and non-contentious private work. The Pinpoint service can equally accommodate the needs of publicly funded and niche practices.

User Base

PINPOINT

		1-5	6-20	21-40	41-75	75+	Top 100
Total firms 189	FIRMS	121	54	11	3	-	-
Total users 1325	USERS	332	560	279	154	-	-



PINPOINT

	✓	✓	✓	✓	✗	✗
	1-5	6-20	21-40	41-75	75+	top 100
	Solo/Very Small 1-5 Users	Small High Street 6-20 Users	Medium High Street 21-40 Users	Larger High Street 41-75 Users	Commercial and Regional Firms 75+ Users	City and Major Regional Firms Top 100+ Firms

Managing Director's Statement



ANDREW SHERWIN
Director

2008 is the 30th anniversary of the Quill Group and there is much to celebrate.

As innovators we introduced the Pinpoint concept of outsourced legal cashing which was unknown in the UK in 1995. Today it remains the leading brand in England and Wales with ever-larger firms now embracing its benefits, which were once considered to be relevant only to smaller practices. Many other services - such as IT support, digital dictation and cost drafting - can now be outsourced and the advantages go far beyond mere cost savings to include efficiencies in knowledge bases, IT overheads and staffing ratios.

As the market leader in the outsourcing of legal cashing and other key practice management functions, Pinpoint:

- employs 50 legal cashiers
- operates from four regional offices
- has over 200 clients
- posts 1.3 million accounting transactions annually
- reconciles 55,000 bank statements
- produces 65,000 month-end and management reports

This year we will be continuing to develop Pinpoint Interactive to meet the LSC requirements for criminal and civil matters as well as launching Pinpoint Office for outsourced document and case management.

Like Pinpoint Interactive, Pinpoint Office will require no capital expenditure, software maintenance nor long-term commitment and will provide a practical, browser-based solution for startup and established practices alike.

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1-5	✓
6-20	✓
21-40	✓
41-75	✓
75+	✗
top 100	✗

Independent View

Select Legal Systems LAWFUSION™

Select's LAWFUSION™ PMS had a glowing debut in last year's Guide, rated excellent by the panel in many technical categories. Naturally, much of the company's development effort this year has gone into ensuring that LAWFUSION™ is up to date and compliant with the LSC reforms for legal aid work. Select has also made LAWFUSION™ work with Windows Vista - no small feat considering how much software out there doesn't.

Document request and assembly

Select's document request system allows fee-earners to monitor the status of requested documents by automatically updating the system when the documents arrive. While useful for conveyancing, this can also, says the company, be applied to any type of work with frequent document requests. A document assembly tool has also been added to automate the production of HIPs and court bundles.

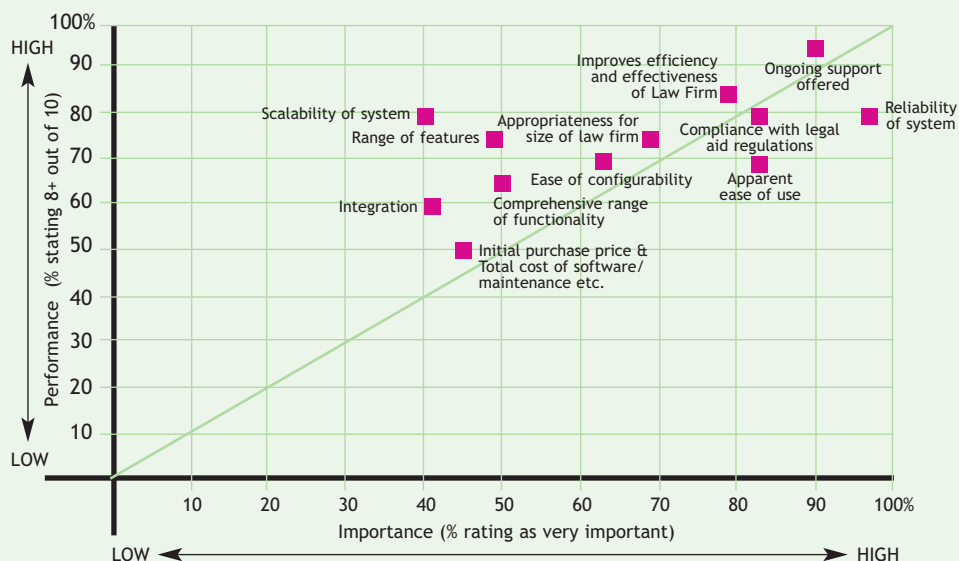
Select has also worked hard to address last year's panel gripe about document version control, adding a visual 'tree' representation of document versions and changes. Online case tracking has also been improved to allow online viewing of uploaded documents by clients or third parties, with access controlled by case management.

Contact details

Select's approach to contacts integration enables users to configure which communication details, including telephone, email and other user-defined fields, are shown on the case screen. Address styles can be setup and associated with contacts allowing different address formats to be output depending on the type of work.

Fee-earners can maintain multiple contacts at one address and the system allows more than one lead contact to be associated with a client. The contact database enables the practice to maintain a history of addresses for contacts and configure marketing information for contacts.

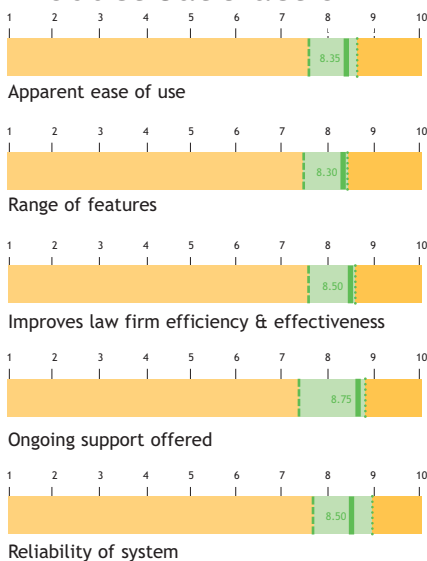
Product Performance Market research results



The Importance/Performance Ratio is a visual representation of each provider's performance on a range of product and company attributes in the context of what's important to the legal profession more generally.

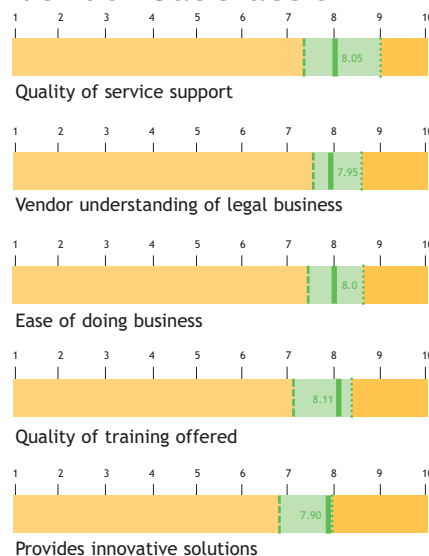
Attributes that score towards the right are perceived to be very important by the legal profession; those that score towards the left are perceived to be of much less importance. Scoring more towards the top right-hand corner is desired.

Product Satisfaction



LOWEST | THIS PRODUCT | HIGHEST

Vendor Satisfaction



Panel Analysis

Select impressed the panel with development zeal and an eye to innovation. It has, like others in this year's Guide, a PDF bundling system with intelligent assembly and adjustable security levels. Select's use of SMS (text messaging), especially for lesser-used purposes, also impressed the panel. Select has taken this idea to a different level, allowing the use of SMS internally for passing messages to fee-earners and staff. The only negatives for Select were a reliance on Crystal reports or Excel, a limited workflow in terms of authorisation of cheque requests and an interface that the panel found 'busy'.

But one panel member said the company had 'a fully featured product which needs a significant amount of tailoring but with a lot of neat little touches' that allows work beyond the limits of some other PMSs. Select also marked itself out by offering interactive cashflow forecasting, computer-telephony integration, electronic cheque/posting requests and the conversion of emailed documents to PDFs 'on the fly'.

Product Pricing (Average cost per seat)

LAWFUSION™

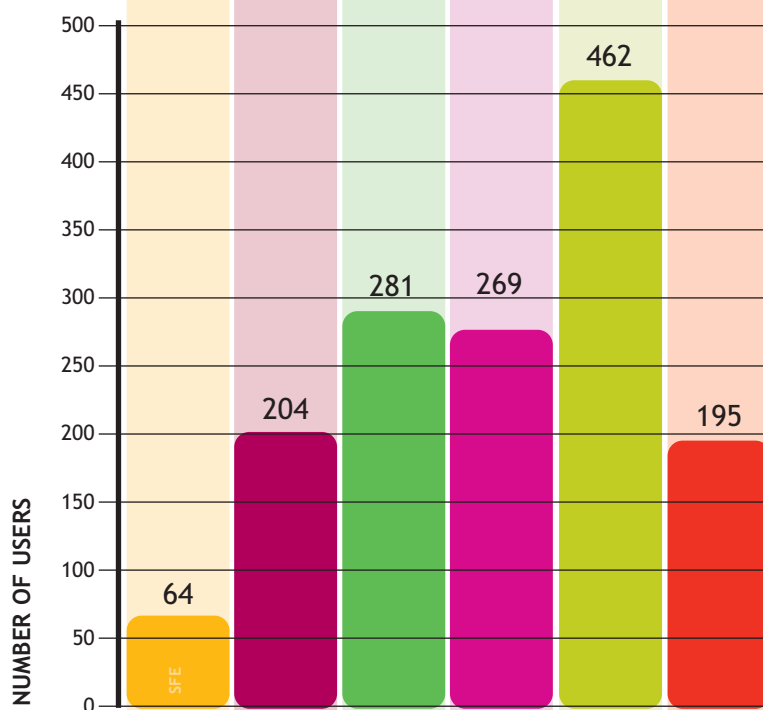
Number of Users	1	5	20	40	75
Cost per seat (includes)	£3450	£1080	£867	£910	£848
Software Installation (days)	0.5	1	2	4	8
Project Management (days)	-	-	1	3	3
Training (days)	2	4	11	15	20
Annual Maintenance/Support Charge	£570	£1170	£2784	£4788	£8547
Maintenance included in year 1	-	-	-	-	-

* Small Firms Edition (SFE)

User Base

LAWFUSION™

		1-5	6-20	21-40	41-75	75+	Top 100
Total firms 58	FIRMS	21	18	9	5	4	1
Total users 1475	USERS	64	204	281	269	462	195



LAWFUSION™

	1-5	6-20	21-40	41-75	75+	top 100
LAWFUSION™	✓	✓	✓	✓	✓	✓
	Solo/Very Small 1-5 Users	Small High Street 6-20 Users	Medium High Street 21-40 Users	Larger High Street 41-75 Users	Commercial and Regional Firms 75+ Users	City and Major Regional Firms Top 100+ Firms

Managing Directors' Statement



MIKE CRAVEN and STEVE DIXON
Directors

We are delighted to have been ranked first for Overall Customer Satisfaction in this year's guide. This endorsement by our clients and the panel member's comment in last year's guide as being rated as 'arguably the best of the best of breed', are testimony and recognition for all the hard work our staff have put in.

We still see the Law Society Guide as the perfect platform to showcase just exactly what LAWFUSION™ has to offer and we are extremely pleased by the positive comments delivered by the Independent Panel.

Our continued aim is to always produce software that enables law firms to reduce costs, increase turnover and deliver improved services to clients and staff. We have achieved this by continually developing the LAWFUSION™ software so it provides a versatile solution that delivers tangible results, whilst utilising innovative solutions such as our new HIP and Document Bundling facility and through the use of new technologies such as Microsoft.NET, web services and our integration with providers for solutions such as our SMS text messaging facility. LAWFUSION™ is suited to all sizes of legal practice, from top 150 practices to the sole practitioner, catering for single office to multiple branch solutions.

As standard, we offer a continued policy of introducing new features and enhancements free of charge to the software every six months as part of our comprehensive and ongoing support and maintenance package. This is a service that will keep your software up-to-date and offers you a truly complete solution.

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Independent View

Solicitors Own Software SOS Connect

The SOS Connect suite runs from case and matter management to customer relationship management and business intelligence. Client Inform automatically generates emails and SMS to inform clients of case milestones.

SOS has this year been using Microsoft's .NET development strategy to allow its larger firm clients to create their own 'portals' to Connect, so they can access their systems as web services.

As well as the expected development work to ensure Connect is compliant with the new LSC requirements for legal aid work, SOS has been developing case and matter management workflow modules, for example for conveyancing, personal injury and wills and probate.

Brighter Outlook

Connect users can drive applications using an entirely Outlook interface, so, for example, anti-money laundering checks when setting up a new client can be prompted through the Outlook task list or Outlook calendar. And as Outlook is to fee-earners, Word is to support staff, so SOS is working on a Word interface for Connect or support staff users.

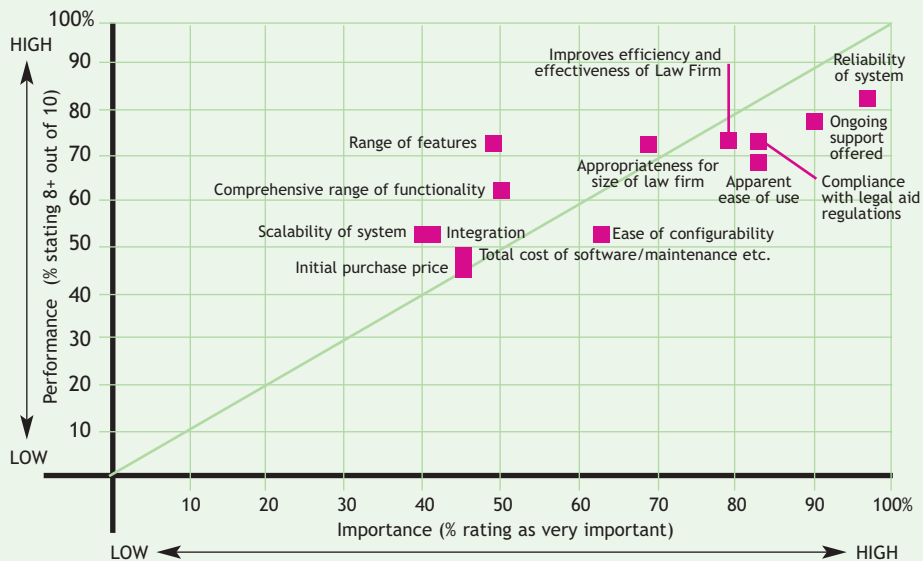
Matter metatags

When emails and SMS are generated on the back of a matter, whether automatically or manually, they are given a matter 'tag' that ensures the message and its replies are filed automatically in the right place with the other material on that matter in the case history as well as the inbox of Outlook. This also allows for automatic time recording of emails - good for solicitors who don't manage to fully log time spent emailing clients.

Host marks

SOS is one of the small but growing number of legal software vendors to provide a hosted service, enabling firms to access applications on a subscription basis - an option that has capital expenditure and flexibility benefits. Given many legal firms' remaining aversion to technology and back-up plans to deal with an IT meltdown, SOS's hosted service also inherently includes business continuity management.

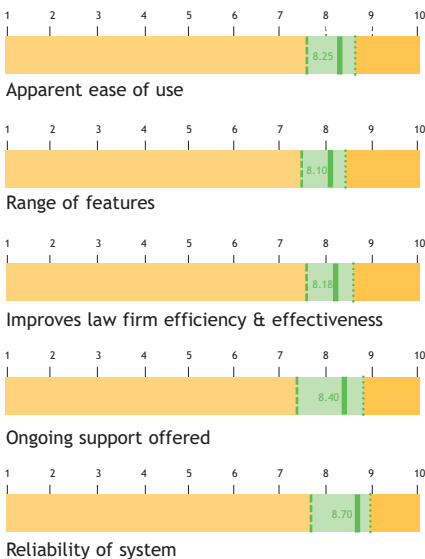
Product Performance Market research results



The Importance/Performance Ratio is a visual representation of each provider's performance on a range of product and company attributes in the context of what's important to the legal profession more generally.

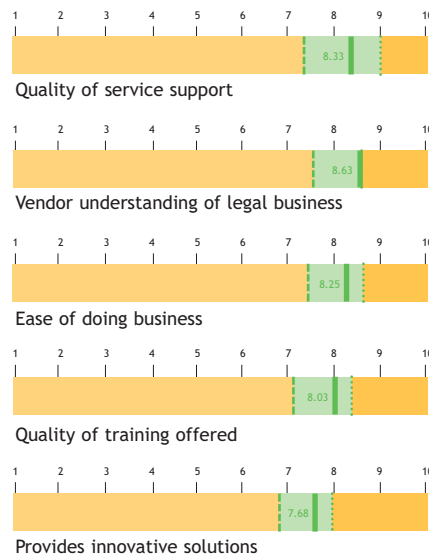
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Product Satisfaction



LOWEST | THIS PRODUCT | HIGHEST

Vendor Satisfaction



Panel Analysis

SOS impressed the panel this year with its tight and deep integration with Microsoft Outlook, something other firms are of course doing, but SOS's ability to provide full access and functionality from within Outlook as well as having a separate (though similar) user interface outside it particularly pleased. This also provides some 'good productivity-enhancing features', found the panel, such as the preview in case history function. Once again, SOS's Virtual Practices online PMS product won panel plaudits as 'good for start-up firms' and beyond. Reporting is through built-in Crystal reports, but SOS can also export to business intelligence tools. SOS has 'addressed a large number of issues' that affect law firms in terms of accounts and case management, said the panel, and is now also offering the system as a web service for firms, including providing cashiers - a forward-looking move.

Product Pricing (Average cost per seat)

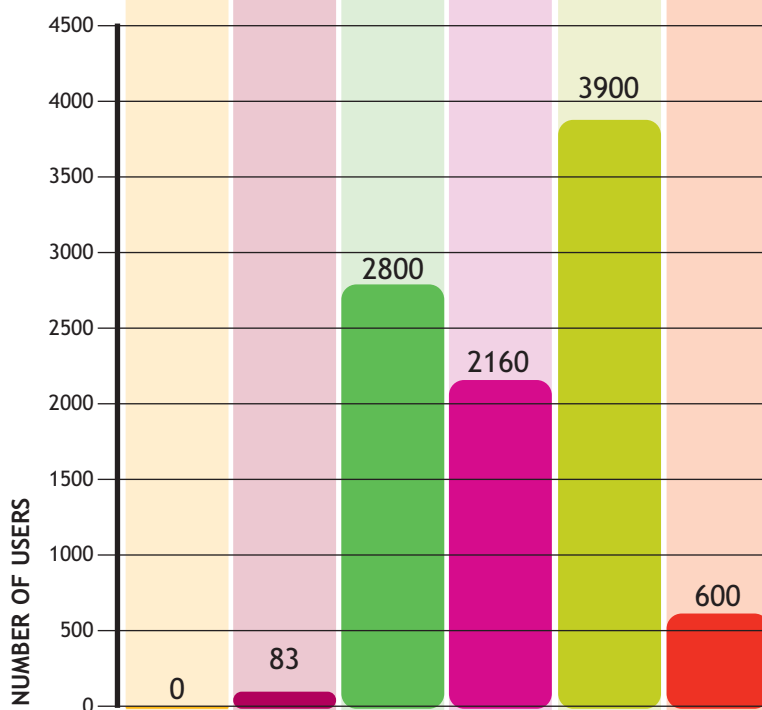
SOS CONNECT

Number of Users	1	5	20	40	75	
Cost per seat (includes)	-	-	£1800	£1400	£1200	
Software Installation (days)	-	-	1	2	2	
Project Management (days)	-	-	3	3	4	
Training (days)	-	-	16	20	22	
Annual Maintenance/Support Charge	-	-	£3800	£6520	£11350	
Maintenance included in year 1	-	-	-	-	-	

User Base

SOS CONNECT

		1-5	6-20	21-40	41-75	75+	Top 100
Total firms 312	FIRMS	0	15	150	92	50	5
Total users 9543	USERS	0	83	2800	2160	3900	600



SOS CONNECT

	✓	✓	✓	✓	✓	✓
	1-5	6-20	21-40	41-75	75+	top 100
	Solo/Very Small 1-5 Users	Small High Street 6-20 Users	Medium High Street 21-40 Users	Larger High Street 41-75 Users	Commercial and Regional Firms 75+ Users	City and Major Regional Firms Top 100+ Firms

Managing Director's Statement



MICHAEL PLATT
Managing Director

SOS Connect is proving to be the ideal software solution for progressive and forward-thinking law firms, enabling them to implement change and plan their growth with confidence. Launched just 12 months ago, the software has resulted in SOS's best trading year in its 20-year history and our specialist teams have been expanded to handle the increase in demand and also to ensure we maintain our high levels of customer service and support which has always been a major focus of the company.

SOS Connect's integration with Outlook continues to prove one of the best in the marketplace and its unique and highly visual scripting system is enabling firms to implement both generic and work-specific case management applications (conveyancing, remortgage, PI, Company Commercial etc.) much more quickly and easily than conventional case systems.

Fully automated email and document filing complete with automatic time recording of both can dramatically improve both operating efficiency and bottom line profitability.

SOS Connect is also a .NET product making it ideal for multi-office firms, remote working and being accessible to your lawyers anywhere - even on the move!

Our well-established Virtual Practices division for smaller firms delivers all the case management benefits of the SOS Connect software as a fully-hosted solution, but with the added option to have a fully managed remote legal cashing service included also.

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Email: e.galvin@soslegal.co.uk

Independent View

TFB plc
Partner for Windows

TFB's principal PMS product, Partner for Windows (P4W), is supplemented by integration with third-party products and services under the auspices of the company's Partner Program, into which a chunk of development effort has been invested since the Guide was last published.

Partner Program

Some of this functionality can be purchased as additional modules to P4W, others, such as integration with online identity checking agencies, SDLT.co.uk and digital dictation services, are available on a pay-as-you-go basis.

The newly developed Step Automation Manager (SAM) is a case-processing tool that automates the production of routine case documents across multiple case types, such as in remortgaging. SAM allows users to bulk-process designated case manager steps without human intervention.

TFB has also integrated P4W with Isokon's trust and probate software so that firms can automate inheritance tax forms and final estate accounts with a schedule of assets and liabilities.

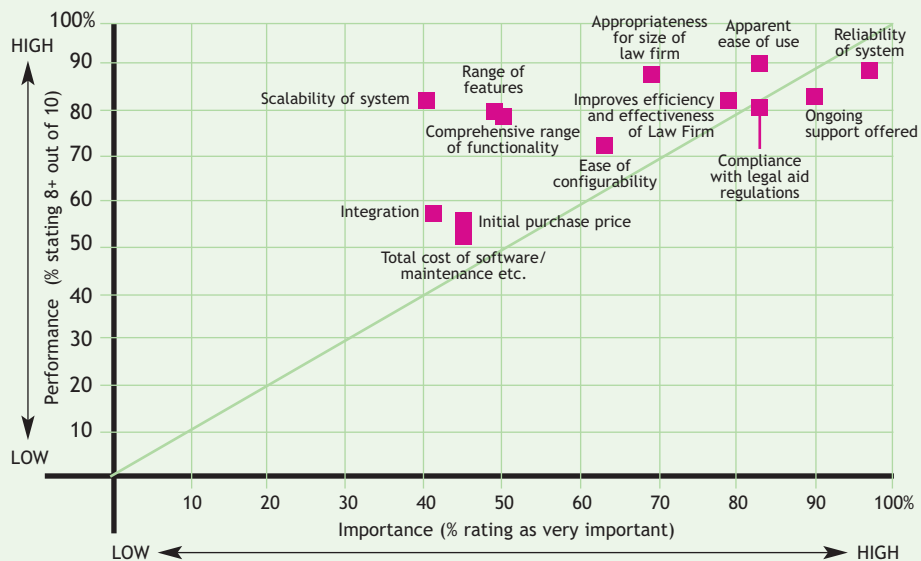
Other enhancements include: a document assembly tool to create a single indexed PDF of all the documents for a matter, for example, for a HIP or court bundle, and PartnerMail, which prompts fee-earners to file emails against a case or client.

V3

At the time of writing, TFB was about to roll out - free to existing customers - the full implementation of P4W Version 3, which will make P4W compliant under the Carter reforms.

In the last year TFB has had some success reaching down to the smaller firm - its Small Practice Edition, targeted at one-to-three user groups, has been purchased by about 50 firms since it went from pilot to full roll-out in the last year.

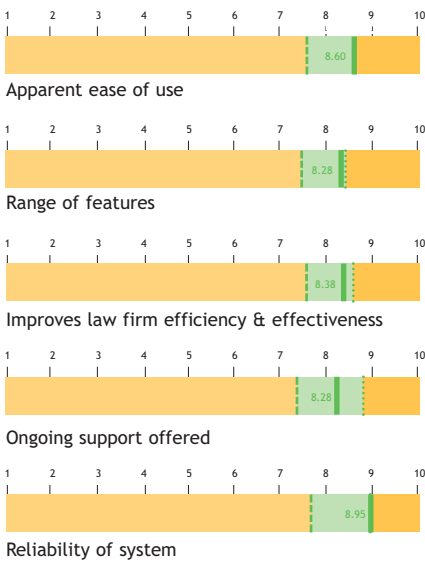
Product Performance Market research results



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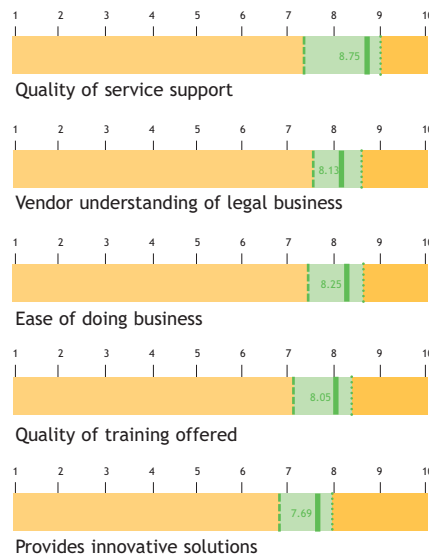
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Product Satisfaction



LOWEST | THIS PRODUCT | HIGHEST

Vendor Satisfaction



Panel Analysis

TFB has a lot of clients involved in publicly funded work and has 'gone the extra mile', felt the panel, to help them deal with LSC funding changes. This represents what the panel feels IT for law firms should be about - being a partner, not just a supplier. Technical elements that impressed the panel included emails that can be created and merged in Word in HTML, more balanced scorecard capability with drill-down into data, 'good' integration with anti-money laundering services, online capability with tiered levels for different types of practice, cashflow forecasting and business continuity support. Email integration could, however, be slicker, said the panel, and TFB's user interface could do with an update. The system also relies on underlying products such as Word for document versioning - something the panel never really likes - but firms can upgrade to better versioning by adding Deltaview, for a fee. But at least one panel member had no negative comments at all - fundamentally another good year for TFB in the eyes of the panel.

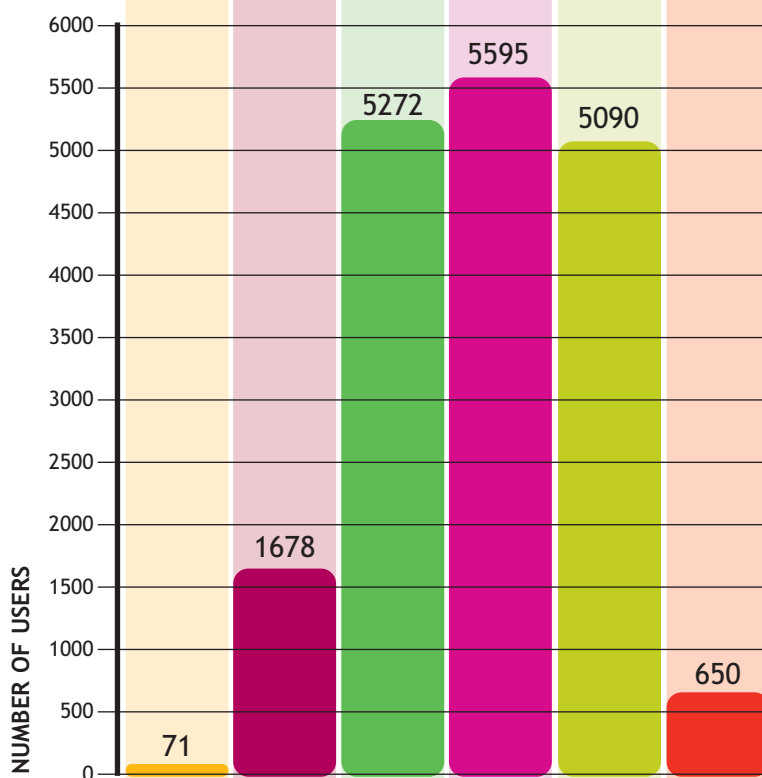
Product Pricing (Average cost per seat)

PARTNER FOR WINDOWS

Number of Users	1	5	20	40	75	
Cost per seat (includes)	£695	£2300	£1600	£1600	£1150	
Software Installation (days)	0	1	1	2	8	
Project Management (days)	0	1	1	3	7	
Training (days)	2	5	5	9	30	
Annual Maintenance/Support Charge	£300	£600	£600	£2120	£6300	
Maintenance included in year 1	✓	✓	✓	✓	✓	

User Base

PARTNER FOR WINDOWS		1-5	6-20	21-40	41-75	75+	Top 100
Total firms 459	FIRMS	34	135	158	85	45	2
Total users 18356	USERS	71	1678	5272	5595	5090	650



PARTNER FOR WINDOWS	✓	✓	✓	✓	✓	✓
	1-5	6-20	21-40	41-75	75+	top 100
	Solo/Very Small 1-5 Users	Small High Street 6-20 Users	Medium High Street 21-40 Users	Larger High Street 41-75 Users	Commercial and Regional Firms 75+ Users	City and Major Regional Firms Top 100+ Firms

Managing Director's Statement



SIMON HILL
Managing Director

TFB recognises that selecting a new case and practice management system can be an incredibly difficult proposition. The time, resources and of course cost involved can make the process a daunting prospect, but at TFB we endeavour to make the whole experience as pain free as possible. Not only is Partner for Windows one of the most comprehensive and versatile solutions available on the market today, we also have a dedicated team of individuals who have a broad range of experience in their specialised area of expertise. In addition to this we are able to offer a range of additional products which feature within the Partner Program that all integrate seamlessly into Partner for Windows and add further value to your system.

We believe this is a winning formula and the results speak for themselves. Not only has TFB achieved six first-place positions within the Guide this year for key areas such as ease of use, reliability of system, ease of configurability and integration with other systems, but Partner for Windows was voted 'Best Software 2007' by the Institute of Legal Cashiers and Administrators.

As the independent choice, our clients can feel reassured that the future of their system is in safe hands.

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ACCESS Practice Management
 AlphaLAW
 AlphaLAW Esprit
 Cognito PracticeManager
 AlphaLAW Vantage
 DPS DPS-Software
 ECLIPSE Proclaim*
 IRIS Connected
 IRIS Evolution
 JCS Legal Office
 IRIS Legal Office
 LINE TIME
 OPSIS Millennium Accounts
 OPSIS Ledger FilOS
 Select Legal Management System
 TFB Partner for Windows
 SOS Connect
 LAWFLUSION™

ACCOUNTS

Fully compliant with the Solicitors' Accounts Rules	•	•	•	•	•	•	•	•	•	•	•	•	•	•	•	•	•	•	•
Accounting reports pack	•	•	•	•	•	•	•	•	•	•	•	•	•	•	•	•	•	•	•
Automatic client account interest calculation	•	•	•	•	•	•	•	•	•	•	•	•	•	•	•	•	•	•	•
Automatic deposit account interest calculation		•	•	•	•	•	•	•	•	•	•	•	•	•	•	•	•	•	•
Credit control	•	•	•	•	•	•	•	•	•	•	•	•	•	•	•	•	•	•	•
Budgeting functions	•	•	•	•	•	•	•	•	•	•	•	•	•	•	•	•	•	•	•
Distinguish incurred, billed and not billed disbursement	•	•	•	•	•	•	•	•	•	•	•	•	•	•	•	•	•	•	•
Automated cheque printing	•		•	•	•	•	•	•	•	•	•	•	•	•	•	•	•	•	•
Automated cheque requests			•	•	•	•	•	•	•	•	•	•	•	•	•	•	•	•	•
Automated posting slips			•	•	•	•	•	•	•	•	•	•	•	•	•	•	•	•	•
Automated bank reconciliation			•	•	•	•	•	•	•	•	•	•	•	•	•	•	•	•	•
Multi-currency					•	•	•	•	•	•	•	•	•	•	•	•	•	•	•
Asset register					•	•	•	•	•	•	•	•	•	•	•	•	•	•	•
Purchase ledger	•		•	•	•	•	•	•	•	•	•	•	•	•	•	•	•	•	•
Direct billing					•	•	•	•	•	•	•	•	•	•	•	•	•	•	•

MANAGEMENT REPORTS AND FEE EARNER PRODUCTIVITY TOOLS

Predefined standard management reports	•	•	•	•	•	•	•	•	•	•	•	•	•	•	•	•	•	•	•
Key performance indicator reports	•	•	•	•	•	•	•	•	•	•	•	•	•	•	•	•	•	•	•
Fee earner WIP reports	•	•	•	•	•	•	•	•	•	•	•	•	•	•	•	•	•	•	•
Fee earner time records	•		•	•	•	•	•	•	•	•	•	•	•	•	•	•	•	•	•
Fee earner time gaps shown	•	•	•	•	•	•	•	•	•	•	•	•	•	•	•	•	•	•	•
Fee earner time written off reports	•	•	•	•	•	•	•	•	•	•	•	•	•	•	•	•	•	•	•
Fee earner target reports	•	•	•	•	•	•	•	•	•	•	•	•	•	•	•	•	•	•	•
Fee earner unbilled time and disbursements	•	•	•	•	•	•	•	•	•	•	•	•	•	•	•	•	•	•	•
Fee earner critical tasks and dates	•	•	•	•	•	•	•	•	•	•	•	•	•	•	•	•	•	•	•
Automated attendance notes	•		•	•	•	•	•	•	•	•	•	•	•	•	•	•	•	•	•
Quick client setup tools	•	•	•	•	•	•	•	•	•	•	•	•	•	•	•	•	•	•	•

TIME RECORDING

Time sheet entry	•	•	•	•	•	•	•	•	•	•	•	•	•	•	•	•	•	•	•
Clock/timer facilities	•	•	•	•	•	•	•	•	•	•	•	•	•	•	•	•	•	•	•
Time recording reports	•	•	•	•	•	•	•	•	•	•	•	•	•	•	•	•	•	•	•
Time rates	•	•	•	•	•	•	•	•	•	•	•	•	•	•	•	•	•	•	•
Matter budget management	•	•	•	•	•	•	•	•	•	•	•	•	•	•	•	•	•	•	•
Automated time recording for tasks	•		•	•	•	•	•	•	•	•	•	•	•	•	•	•	•	•	•
Time management	•	•	•	•	•	•	•	•	•	•	•	•	•	•	•	•	•	•	•
Billing guides	•	•	•	•	•	•	•	•	•	•	•	•	•	•	•	•	•	•	•
Automated phone tools TAPI			•	•	•	•	•	•	•	•	•	•	•	•	•	•	•	•	•

CLIENT MATTER DATABASE FUNCTIONALITY

Automated conflict checking	•	•	•	•	•	•	•	•	•	•	•	•	•	•	•	•	•	•	•
Full conflict search across selected data fields	•	•	•	•	•	•	•	•	•	•	•	•	•	•	•	•	•	•	•
Limitation dates	•	•	•	•	•	•	•	•	•	•	•	•	•	•	•	•	•	•	•

	ACCESS Practice Management	AlphaLAW Esprit	AlphaLAW Vantage	Cognito PracticeManager	DPS DPS-Software	ECLIPSE Software	IRIS Proclaim®	IRIS Connected	IRIS Evolution	JCS Legal Office	LINE TIME Ledger FilLOS	OPSS Practice Management System	OPSS Millennium Accounts	OPSS Liberate	Select Legal Management System	TFB Partner for Windows	LAWFUSION™	SOS Connect
Matter duplication checking	•	•	•	•	•	•	•	•	•	•	•	•	•	•	•	•	•	•
Experts register	•	•	•	•	•	•	•	•	•	•	•	•	•	•	•	•	•	•
Audit trail for conflict checks		•	•	•	•	•	•	•	•	•	•	•	•	•	•	•	•	•
Anti-money laundering checks	•	•	•	•	•	•	•	•	•	•	•	•	•	•	•	•	•	•
Budget limit settings	•	•	•	•	•	•	•	•	•	•	•	•	•	•	•	•	•	•
Credit checking	•		•	•	•	•	•	•	•	•	•	•	•	•	•	•	•	•
Undertaking recording	•		•	•	•	•	•	•	•	•	•	•	•	•	•	•	•	•
Matter locking				•	•	•	•	•	•	•	•	•	•	•	•	•	•	•
Risk management banding		•	•	•	•	•	•	•	•	•	•	•	•	•	•	•	•	•
Risk management commentary		•	•	•	•	•	•	•	•	•	•	•	•	•	•	•	•	•
Risk management supervision tools			•	•	•	•	•	•	•	•	•	•	•	•	•	•	•	•
Create automated checklists/workflows	•		•	•	•	•	•	•	•	•	•	•	•	•	•	•	•	•
Matter planning tools	•		•	•	•	•	•	•	•	•	•	•	•	•	•	•	•	•
Critical notes recording facility	•	•	•	•	•	•	•	•	•	•	•	•	•	•	•	•	•	•
Locking transaction/matter history	•	•	•	•	•	•	•	•	•	•	•	•	•	•	•	•	•	•
Wills and deeds register	•		•	•	•	•	•	•	•	•	•	•	•	•	•	•	•	•
Single central database for all contacts	•	•	•	•	•	•	•	•	•	•	•	•	•	•	•	•	•	•
Multiple clients on matter	•	•	•	•	•	•	•	•	•	•	•	•	•	•	•	•	•	•
Unlimited contacts on a matter	•	•	•	•	•	•	•	•	•	•	•	•	•	•	•	•	•	•
Relationship definition	•	•	•	•	•	•	•	•	•	•	•	•	•	•	•	•	•	•
Full search/sort facilities	•	•	•	•	•	•	•	•	•	•	•	•	•	•	•	•	•	•
DOCUMENT PRODUCTION																		
Automated document production for single client/contact	•	•	•	•	•	•	•	•	•	•	•	•	•	•	•	•	•	•
Automated document production for range of clients/contacts	•	•	•	•	•	•	•	•	•	•	•	•	•	•	•	•	•	•
Automated multiple document production	•		•	•	•	•	•	•	•	•	•	•	•	•	•	•	•	•
Version control of documents	•		•	•	•	•	•	•	•	•	•	•	•	•	•	•	•	•
Ease of document retrieval from within Word	•	•	•	•	•	•	•	•	•	•	•	•	•	•	•	•	•	•
Form integration	•		•	•	•	•	•	•	•	•	•	•	•	•	•	•	•	•
Free text searching	•	•	•	•	•	•	•	•	•	•	•	•	•	•	•	•	•	•
Write back from documents to database			•	•	•	•	•	•	•	•	•	•	•	•	•	•	•	•
'Intelligent document' facilities	•		•	•	•	•	•	•	•	•	•	•	•	•	•	•	•	•
Document assembly	•		•	•	•	•	•	•	•	•	•	•	•	•	•	•	•	•
EMAIL FUNCTIONALITY																		
Email inbox integration	•	•	•	•	•	•	•	•	•	•	•	•	•	•	•	•	•	•
Outgoing email recorded in transaction history	•	•	•	•	•	•	•	•	•	•	•	•	•	•	•	•	•	•
Automated email time recording	•		•	•	•	•	•	•	•	•	•	•	•	•	•	•	•	•
Full sent email storage	•	•	•	•	•	•	•	•	•	•	•	•	•	•	•	•	•	•
Original email viewing	•	•	•	•	•	•	•	•	•	•	•	•	•	•	•	•	•	•
Automated email routing directly to a matter file	•		•	•	•	•	•	•	•	•	•	•	•	•	•	•	•	•
Email encryption facilities	•		•	•	•	•	•	•	•	•	•	•	•	•	•	•	•	•
Outlook integration	•	•	•	•	•	•	•	•	•	•	•	•	•	•	•	•	•	•

ACCESS Practice Management
 AlphaLAW Esprit
 Cognito PracticeManager
 AlphaLAW Vantage
 DPS DPS-Software
 ECLIPSE Proclaim®
 IRIS Connected
 IRIS Evolution
 JCS Legal Office
 IRIS Legal Office
 LINETIME Liberate
 OPSIS Millennium Accounts
 OPSIS Practice Management-System
 Select Legal L&WFUSION™
 TFB Partner for Windows
 SOS Connect

DIARY AND SCHEDULING

Proactive date management (e.g. prompts for missed dates)	•	•	•	•	•	•	•	•	•	•	•	•	•	•	•	•	•	•
Firm-wide diaries	•	•	•	•	•	•	•	•	•	•	•	•	•	•	•	•	•	•
Individual diary access	•	•	•	•	•	•	•	•	•	•	•	•	•	•	•	•	•	•
Separate task and appointment management			•	•	•	•	•	•	•	•	•	•	•	•	•	•	•	•
Resource diaries			•	•	•	•	•	•	•	•	•	•	•	•	•	•	•	•
Escalation of tasks/to do items to supervisor	•	•	•	•	•	•	•	•	•	•	•	•	•	•	•	•	•	•
Proactive scheduling	•		•	•	•	•	•	•	•	•	•	•	•	•	•	•	•	•

CUSTOMISATION AND VIEWS

Tools for customised workflow development	•		•	•	•	•	•	•	•	•	•	•	•	•	•	•	•	•
Tools for customising matter types	•	•	•	•	•	•	•	•	•	•	•	•	•	•	•	•	•	•
Tools for customising data (user-defined fields)	•		•	•	•	•	•	•	•	•	•	•	•	•	•	•	•	•
Tools for customising user help screens	•		•		•	•	•		•		•		•		•		•	
Document view	•	•	•	•	•	•	•	•	•	•	•	•	•	•	•	•	•	•
Transaction history view	•	•	•	•	•	•	•	•	•	•	•	•	•	•	•	•	•	•
Web browser enablement					•				•	•		•		•		•		•
Accessible from within Word					•			•	•	•		•		•		•		•
Accessible from within Outlook					•			•	•	•		•		•		•		•
Contact and relationship views	•	•	•	•	•	•	•	•	•	•	•	•	•	•	•	•	•	•

THIRD PARTY DATA TRANSFER ONLINE AND SYSTEMS ADMINISTRATION

Ability to transfer data to third party systems online	•		•	•	•	•	•	•	•	•	•	•	•	•	•	•	•	•
NLIS integration	•		•	•	•	•	•	•	•	•	•	•	•	•	•	•	•	•
Legal Services Commission e-lodgement	•	•	•	•	•	•	•	•	•	•	•	•	•	•	•	•	•	•
STARS integration			•		•	•	•	•	•	•	•	•	•	•	•	•	•	•
Adding/amending users	•	•	•	•	•	•	•	•	•	•	•	•	•	•	•	•	•	•
Systems administration security	•	•	•	•	•	•	•	•	•	•	•	•	•	•	•	•	•	•
Systems administration audit trails	•	•	•	•	•	•	•	•	•	•	•	•	•	•	•	•	•	•

LEGAL AID AND MISCELLANEOUS

Legal Aid - civil contract management reports	•	•	•	•	•	•	•	•	•	•	•	•	•	•	•	•	•	•
Legal Aid - criminal contract management	•	•	•	•	•	•	•	•	•	•	•	•	•	•	•	•	•	•
Use through mobile/remote devices (e.g. Personal Digital Assistants)			•		•		•		•	•				•		•		•
Integrated voice recognition			•		•	•		•	•	•				•		•		•
Data replication	•		•		•	•	•	•	•	•		•		•		•		•
Client extranet upload facilities			•		•	•	•	•	•	•	•	•	•	•	•	•	•	•
Automated SMS text messaging	•		•		•	•	•	•	•	•	•	•	•	•	•	•	•	•
Project management tools			•	•	•	•		•	•	•	•	•	•	•	•	•	•	•

How to select legal software

This is a potentially huge topic that is examined in more detail on the Software Solutions Guide's accompanying website at www.it.lawsociety.org.uk. However, the following tips and tricks highlight some of the issues that can be associated with the selection of legal software.

It is for solicitors to ensure that whatever software is purchased enables them to comply with the requirements of the Solicitors' Accounts Rules and that the new system operates correctly before the old system is abandoned.

In devising your business plan, take into account both your immediate needs and what you expect to be doing in five years. For example, do you have plans for branch offices? Will you still be handling legal aid work?

Be clear about what you hope to gain from your investment in IT. Ideally, it should help save you money - typically by reducing the number of clerical staff you need to support fee-earners - and help you earn more money by improving efficiency and hence profitability.

Prepare a budget. How much can you afford to spend, taking into account essential extras such as installation, staff training and annual maintenance fees? These prices exclude hardware. As a rule of thumb, assume annual running costs of approximately one third of the initial capital outlay.

When building your plan, never underestimate the importance of allowing enough time and money for the appropriate amount of initial training and refresher courses required in order to get the most from your new system.

Use this Guide and its recommendations to draw up a shortlist of suppliers whose products seem to meet your needs - although please note this is not an exhaustive list of all the options available.

You should note that the pricing in the Guide is only an indication and that you should be prepared to spend time with your shortlisted suppliers, making sure all parties are clear on what is required.

Evaluate the shortlisted suppliers by visiting their reference sites to see their systems in operation, talk to the users of these systems and meet the suppliers' personnel to ensure they are the sort of people you can work with over the next few years.

Ensure that members of your staff who will be expected to use the new systems are included in the selection process. Not only will this help win their 'buy-in' to the project, but their alternative perspectives can be invaluable in assessing the respective merits of different products.

Make your final selection and enter into contractual negotiations with the prospective supplier over not only costs but also delivery dates, implementation timetables and provision and scheduling of staff training so it fits in with your priorities.

You can read and download a series of advice papers and the previous Software Solutions Guide from the Law Society's website. A special section has been set up for IT advice at www.it.lawsociety.org.uk. You can also catch news about IT and the law in the Law Society's *Gazette* every week.

Acknowledgements

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We would also like to thank all those firms who took part in the independent customer feedback research which has enabled the Selection Panel to ensure that customer satisfaction is continually maintained.

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