

Software Solutions 2007

A Guide to Legal Software Suppliers



The Law Society

Supported by:



Panel
Customer feedback
Finance
Independent view



A word from the President

Welcome to the 2007 edition of the Law Society's Software Solutions Guide. Now in its ninth edition, this Guide continues to be the single most influential 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 — which includes an evaluation of their products by our selection panel; an assessment of their corporate financial health by chartered accountants and extensive market research into the views of existing users of their systems — thereby providing you with an excellent starting point for your IT purchasing decisions.

Firms of all types and sizes increasingly think of IT as a routine part of their day-to-day operations. Extraordinarily sophisticated technology is rightly regarded as part of the infrastructure necessary to provide an efficient service to clients. Most practitioners are now comfortable with IT as tool to support their businesses and when it works well it is almost invisible.

Of course, the 'taken-for-granted' nature of IT means that it can be highly disruptive when it goes wrong. Firms are recognising this by ensuring that they have comprehensive information security, business continuity and disaster recovery plans in place.

IT can also be quietly disruptive when it encourages changes in business practice. It is possible to resist these changes or be unaware that they can be made — how many firms make full use of even a fraction of the functionality available in their legal software system — but, over time, firms need to respond to client demand or the opportunity to work more efficiently.

Finally, 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. A well-chosen, well-run, efficient and 'taken-for-granted' legal software system should be a solid foundation on which to build when considering how to respond to such major challenges.

A handwritten signature in black ink that reads "Fiona Woolf". The signature is written in a cursive, flowing style.

Fiona Woolf
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 panel, where they demonstrate their software. The 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 panel makes the final decision on which suppliers should be included in the Guide, based on the selection criteria outlined here.

The panel

Robin ap Cynan Council member; Principal, Lupus Mediation

Tony Fisher Managing partner, Fisher Jones Greenwood

Simon Young Council member; legal management and training consultant

Mike Gorick Practice director, Marshall & Galpin

Tim Hill E-commerce policy adviser, Law Society

Rupert White IT reporter, Law Society Gazette

Guest panellist:

Stuart Whittle Head of IT, Partner, Weightmans

It should be noted that the selection 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 very pleased to again be supporting the Law Society in the production of this Software Solutions Guide.

The LSSA is the industry body for legal systems suppliers in the UK. For more than 12 years we have represented the majority of the legal software suppliers.

Currently with 25 of the leading legal system suppliers as members, (many of whom are featured in this guide) we aim to both set and maintain professional standards within the industry and manage areas of mutual interest with respect to the promotion and advancement of legal systems technology.

The LSSA has set up and actively contributes to a number of different working parties and forums, bringing together different organisations with the aim of advancing legal systems technology.

As an association, our software is in use in excess of 75% of firms in private practice. A recent survey of member firms has shown that collectively our legal aid software is used by 87% of all firms who undertake publicly funded work in England and Wales.

It is for these reasons that the LSSA provides an extremely representative and unified voice for the legal software industry and is best placed to be a

Simon J. Meehan
Chairman LSSA



focal point, providing a key role and focus in establishing standards and cooperation between suppliers, professional bodies, and government organisations.

Over the past couple of years it has become clear that the legal profession is likely to undergo massive change over the next decade as the legal landscape changes. Following the Clementi recommendations and more recently the Carter report and its wide-ranging implications for legal aid reform, whether you believe these changes are for the better or worse, one thing is clear: law firms will have to adapt and embrace the change if they want to survive and prosper in the future.

This is where technology can make the difference between success and failure to your business, and this is where the LSSA is working to ensure that we are consulted early and understand the implications of the changes that are being imposed. This will ensure that we are better placed to provide the systems that will help you to maximise your productivity and profitability and embrace the ever-changing legal landscape of the future.

Finally, success breeds success. To be successful we need to ensure you succeed in adapting to change and gaining real benefits from IT that can make such a difference to your business.

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

Independent View

Access Legal Systems Access Practice Management

With a new Web-based interface that allows clients and fee earners alike to interact with the system over the Internet, Access has, in effect, become 'remote access' and even 'mobile access' to its users.

Online access for clients

Clients can now be given a password and allowed into the case management system, via a secure Internet connection, to check up on the progress of their matters – which might well reduce the time that a high-street firm, for instance, spends answering calls from clients anxious to know the state of play with their conveyance. For the brave, this technology can be configured to let major commercial clients see live data within the practice management system that relates to work in progress on their matters.

Remote access for fee earners

The new Web interface serves a second purpose, which many firms will find useful at a time when home-working and flexible hours seem to be in vogue. Fee earners and other staff can now log into Access from their home computer – or, indeed, from any laptop or any mobile phone capable of browsing the Web. This makes it much easier for lawyers to work effectively from home and to use Access's time-recording application when they are on the move.

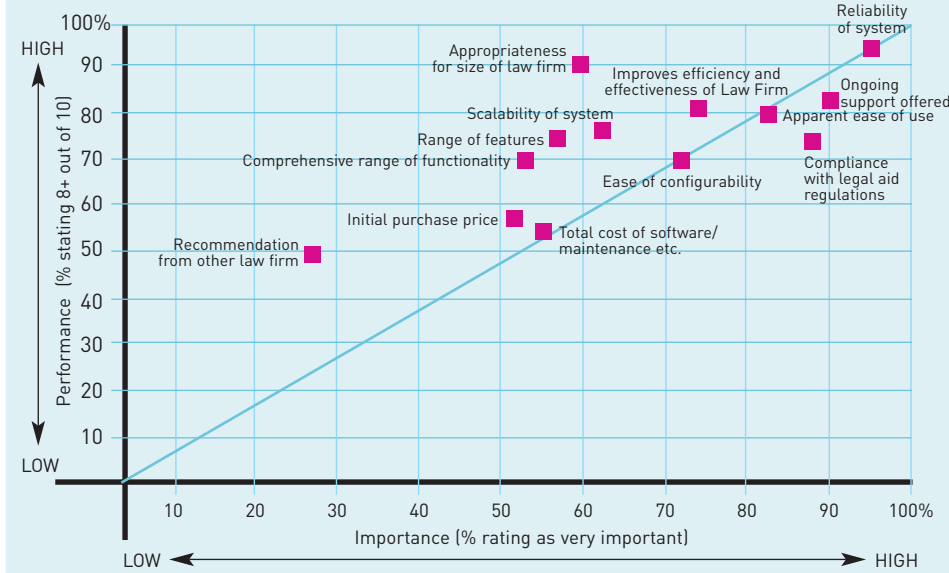
CRM, HR and conflicts

Next on the development agenda, Access is planning to exploit its database's potential to help with marketing, HR and conflict-checking tasks.

Version control

Finally, a word about version control: Access has been criticised in the past for not having a version-control application embedded in its case management system – rather, the system uses the 'native' version control and document comparison functions in Microsoft Word to do the job. It appears that Microsoft has significantly improved the quality of these tools in Office 2007 – so perhaps Access doesn't have to reinvent the wheel, after all.

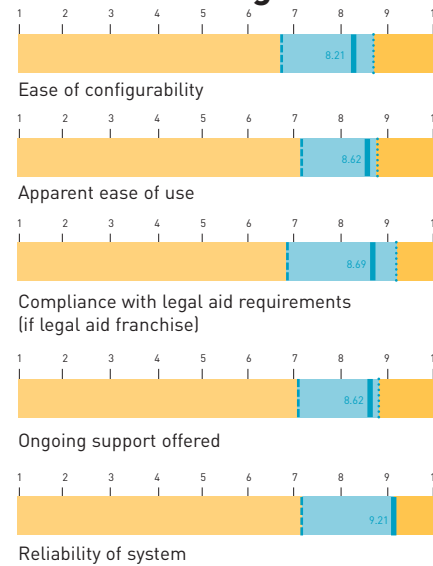
Product Performance Market research results



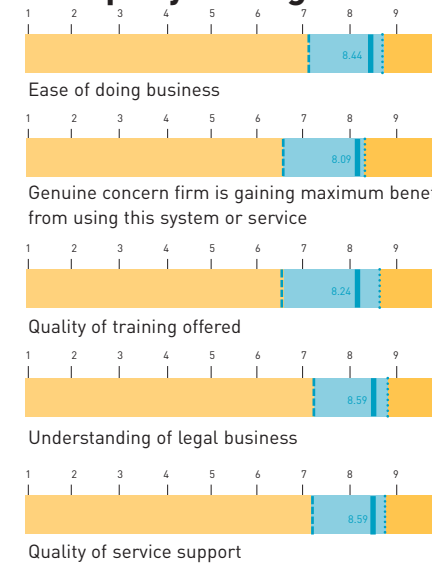
The Importance/Performance Ratio is a visual representation of each provider's performance on a range of product and company attributes in the context of what's important to the legal profession more generally.

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 Ratings



Company Ratings



LOWEST | THIS PRODUCT | HIGHEST

Panel Analysis

Access gained mentions in dispatches for the presence of triggers for alerts on attempts to pay in money before money laundering checks are done, the ability to record a wide range of information against both clients and contacts, and good conflict checking. However, money laundering checks are not compulsory for selected work types and, though conflict checking is extensive and valid, it is still down to the user to decide what to search. The panel noted that the likely impact of legal services reforms might require more of Access's management's attention.

In terms of technology, Access shows vision: automatically filing incoming emails if they include case numbers is good and should become the norm in time. Similarly novel now but soon to be normal, SMS messaging has been built in to the system. The .NET path Access has taken is seen as a safe one for users, even if it is initially a lot of work for vendors. Access's focus on Web security also impressed, with good access-rights management thinking backing up how much sensitive law firm information users can remotely access. This Web focus also allows easier moves to offsite backup and checking, something else Access offers, and beyond – if your data is live and fully useable offsite, business continuity is a lot more realisable.

Product Pricing (Average cost per seat)

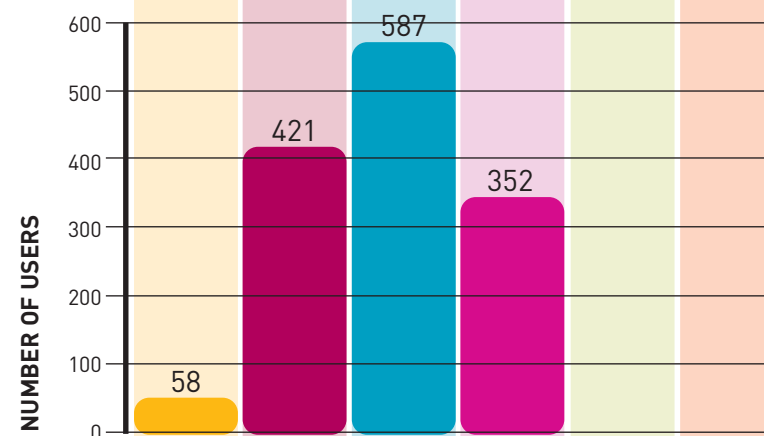
ACCESS PRACTICE MANAGEMENT

Number of Users	1	5	20	40	75	
Cost per seat (includes)	£3670	£1744	£961	£833	£722	
Software Installation (days)	0	1	1	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 81	FIRMS	20	32	22	7	-	-
Total users 1418	USERS	58	421	587	352	-	-



ACCESS PRACTICE MANAGEMENT

	✓	✓	✓	✓	✓	✗
	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



GEORGE FOWLER
Managing Director

We are pleased in this our second year in the guide to have our users confirm that we have the most reliable software available to the profession. The working solicitor has a growing dependency on IT systems and it is important that the facilities are always available.

The basis of this reliability is the single SQL database supporting all of our applications and our 27 years of experience in supplying applications to the legal profession. Throughout these years of commitment we have given an absolute priority to ensuring the continuity of our client data. We have achieved this by rigorously enforcing appropriate backup procedures, by ensuring that the technology is suitable to the task in hand and by offering full conversion of data to new operating platforms. Practices which have been with us for all of our 27 years have been able to seamlessly migrate from one technology platform to the next without loss of data and without disruption to workflow.

This year we have complemented our Practice Management System with the introduction of .NET facilities designed to allow secure interrogation and update of user databases via the Internet giving significant marketing advantage to our clients.

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1-5

6-20

21-40

41-75

75+



Independent View

AIM Evolution InSight R2

In recent years, AIM's development strategy has been focused on introducing corporate-style business processes to its user base, taking the well-established Evolution product suite into pastures new – witness last year's launch of the re-branded and comprehensively upgraded Evolution InSight legal office solution. This year, AIM has stuck to its guns and development has continued in a similar vein, with a range of refinements and enhancements in the company's latest offering, Evolution InSight R2.

Case management

On the case management front, one of the most obvious additions is a 'to-do list' application, which serves two purposes: to give fee earners a useful snapshot of escalations, notifications and other aspects of their workload, and to provide line managers with a higher-level view of where staff have got to on matters. Also new in R2 is the ability to batch-process routine tasks, which promises to speed up repetitive, low-value work.

Management reporting

In the back-office, the tally of standard management reports has also increased with a budget variance report and a 'top clients report' that works in tandem with AIM's marketing module to pinpoint client profitability. Business intelligence tools include time analysis aimed at helping managers to monitor staff 'utilisation and the realisation of work within their teams'.

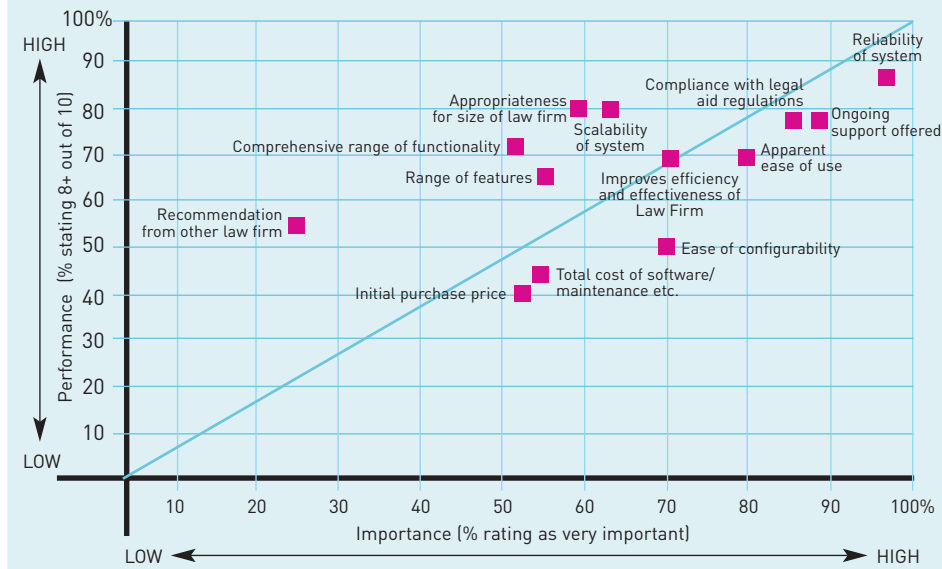
Free upgrade

Commendably, AIM has offered all law firms using Evolution a free upgrade to the R2 product and has laid on free training workshops to ease them into the new system.

Development strategy

AIM is by no means unique among legal software houses in attaining 'Microsoft gold certified partner status' (which lets a developer work more closely with the software giant). But this commitment to investment in the Microsoft technology platform shows long-term commitment. AIM has also announced a further association with Microsoft to deliver Web portal applications and online collaborative-working technologies, based on the Microsoft platform.

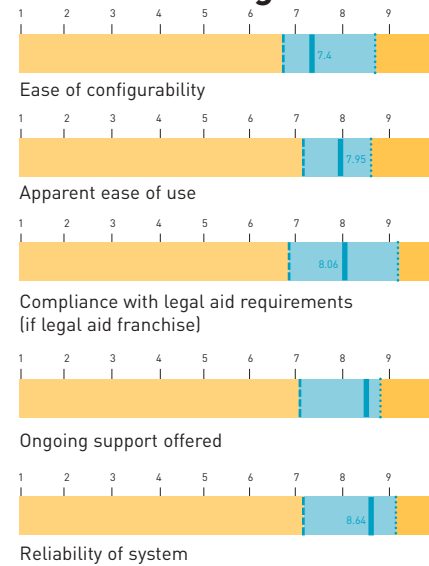
Product Performance Market research results



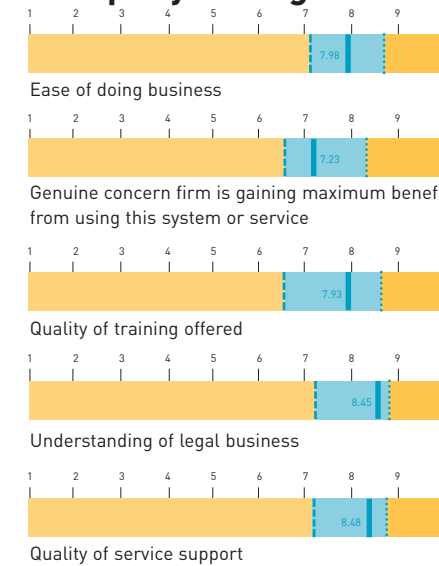
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Product Ratings



Company Ratings



LOWEST | THIS PRODUCT | HIGHEST

Panel Analysis

AIM is one of the three firms acquired this year by the consolidation company Computer Software Group. The main focus of AIM's development seems to have been in working out how to present the increasing mass of information available to fee earners – not something unique, but it shows vision as to how law firms will need to run more like other businesses in future. Solid integration with Microsoft Outlook and a 'digital dashboard' for fee earners provide a good deal of this.

'Show my Work' screens provide new ways of displaying and sorting tasks that can be actioned directly from the task list. 'Very clear and informative management information reports', a 'last matters' quick query functionality, summaries of fee earner performance on the desktop and a 'top clients' report all showed enhanced reporting. Work also seems to have been done on budget variance and cashflow forecasting. This reporting and use of business information was also reflected in customer relationship management. The panel noted 'excellent' CRM functionality, showing source of business at client and matter level, and good analysis of 'relationships' between contacts and clients and contacts and matters. Risk management by client by entry of credit control information, good external links for postcode checking, and use of online money laundering checks all showed vision.

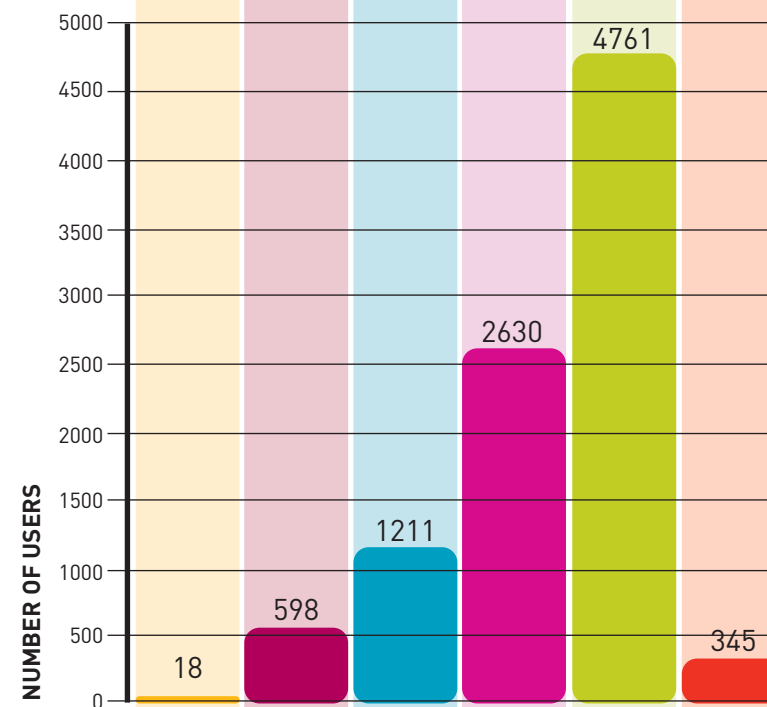
Product Pricing (Average cost per seat)

EVOLUTION INSIGHT R2

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 INSIGHT R2		1-5	6-20	21-40	41-75	75+	Top 100
Total firms 192	FIRMS	5	59	43	44	39	2
Total users 9563	USERS	18	598	1211	2630	4761	345



EVOLUTION INSIGHT R2	1-5	6-20	21-40	41-75	75+	Top 100
	✓	✓	✓	✓	✓	✓

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



JIM CHASE
Managing Director

2006 saw the announcement of many new orders for Evolution InSight, very often based on recommendation from our customers. The R2 upgrade to Evolution InSight was launched, focussing on fee earner and secretarial productivity and it is good to see this reflected in the survey results. As ever, we have worked hard to support our customers to the highest standards.

Evolution InSight offers a rich solution for a wide variety of firms from the smallest of start-ups to the largest of multi-disciplinary firms and in-house departments. The secret to this is the wide range of configurations and flexible implementation options based on a scalable Microsoft platform.

As part of CS Group, one of the UK's largest software companies, we enjoy real benefits in terms of product investment and 'know-how' collaboration with colleagues in both the legal and non-legal spaces.

Without doubt, our biggest satisfaction in this year's customer survey is the extent to which our customers are prepared to recommend us to other firms. This measure really matters and we are delighted with our top five ranking.

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Catherine Bailey
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Email: legal@computersoftware.com

1-5

6-20

21-40

41-75

75+

Top 100

Independent View

AlphaLAW

The past year has seen a steady stream of refinements across AlphaLAW's deservedly popular range of legal systems, most notably on the case management front.

Better client updates online

A new version of the Client Web Access application, which allows both clients and third parties to view the status of cases online, is more configurable and neater-looking than its antecedent. It also gives clients the option of requesting case progress updates via email or mobile phone text-message.

Improved conveyancing workflow

To boost the power of the AlphaLAW-Uno case management product, AlphaLAW has significantly updated its conveyancing workflow module, which now contains a very comprehensive schema of sale, purchase, and re-mortgage work, along with 300 standard documents to go in the flow.

HotDocs in the house

Another enhancement sees the HotDocs document assembly system embedded in Uno, to handle types of work where users need to compile complex documents as part of the standard case workflow. Leases, for instance, have to be built from a library of standard paragraphs.

SDLT integration

Another push on the systems integration front creates a link to the online stamp-duty system, SDLT.co.uk. At the end of a conveyancing case, Uno can automatically populate an electronic version of the SDLT form.

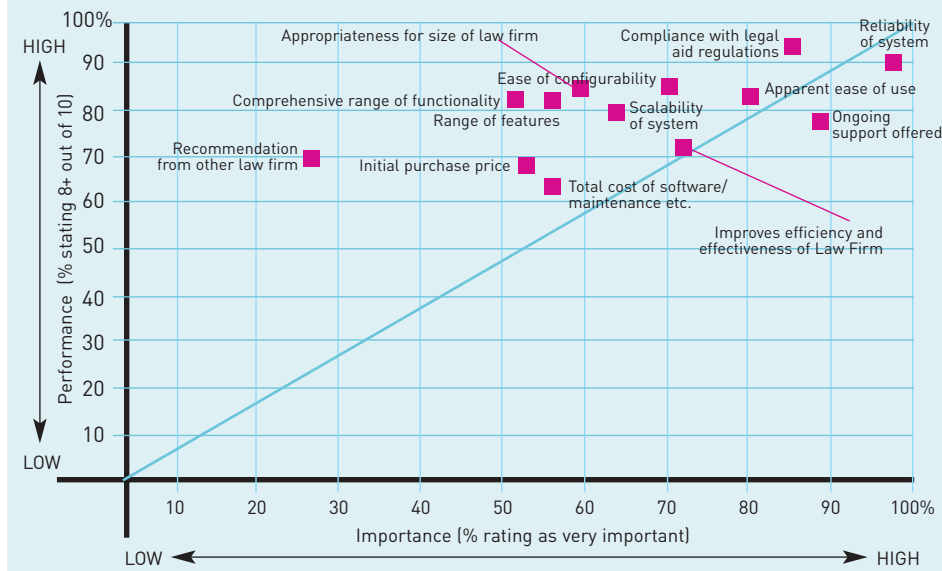
Clearer user interface

Uno's user interface has also seen some improvement. The user's task list has been added to the 'fly-out' bars at the side of the screen, alongside buttons giving access to the diary, email inbox, and active matter list. This arrangement allows the task list to be viewed without blocking other parts of the screen.

In the pipeline

Scheduled for launch in 2007 is a new personal injury workflow package – more sophisticated and more user-configurable than the current offering – which will appeal to larger firms. And next on the integration agenda is GB Group's URU system, which will enable AlphaLAW users to conduct instant identity checks on clients and others over the telephone, cutting out the time-consuming need for firms to make photocopies of passports, drivers' licences and other identity documents.

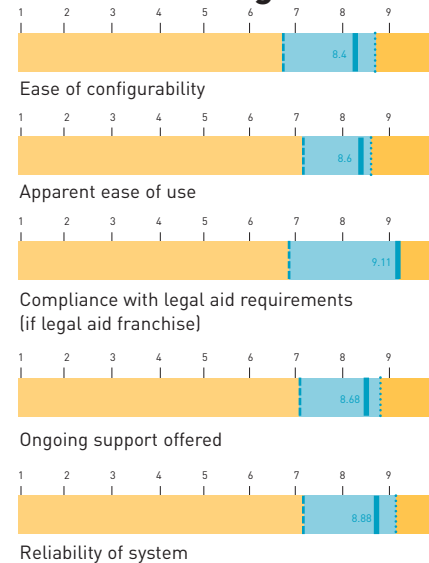
Product Performance Market research results



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.

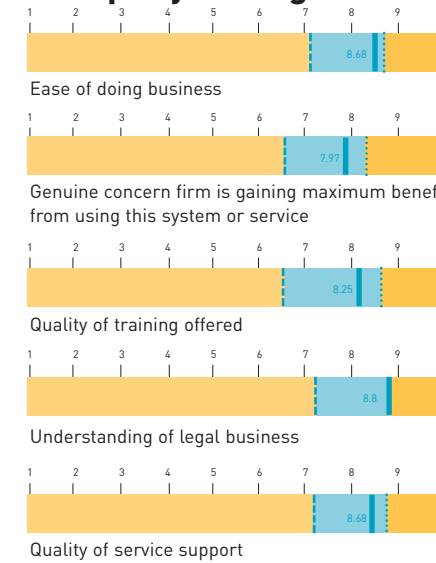
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Product Ratings



LOWEST | THIS PRODUCT | HIGHEST

Company Ratings



Panel Analysis

AlphaLAW came top in overall satisfaction ranking for the third year running in this year's Guide. Attention to client satisfaction could be the cause of this, but AlphaLAW has also not sat on its laurels in terms of development. The panel liked the improved 'look and feel' of the graphical user interface of AlphaLAW's products, replete with task list improvements. New change control features for better auditing, computer-telephony integration and innovative email integration, including using email addresses to help assign emails to matters automatically, all figured in the panel's positive reports. Emails and text messages triggered by case events also impressed the panel.

Also noted was the introduction of 'intelligent documents', which carry out some path analysis and build according to answers to questions. The panel noted a knowledgeable approach to disaster recovery, a solid system approach to money laundering checks and POCA, as well as good email handling and extranet arrangements. The panel has also been told that a full online offering, online ID checking and SDLT submissions are planned, developments which would bring AlphaLAW in line with other forward-thinking vendors.

Product Pricing (Average cost per seat)

ALPHALAW VANTAGE

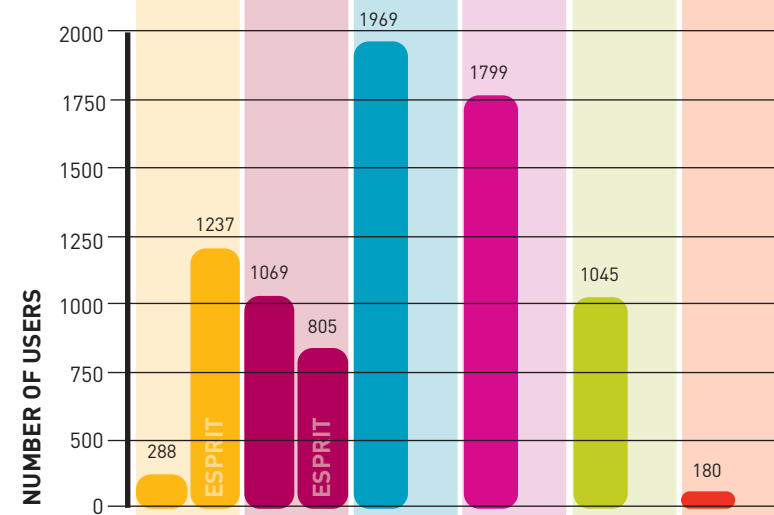
Number of Users	1	5	20	40	75	
Cost per seat (includes)	£4150	£1460	£884	£793	£740	
Software Installation (days)	0	1	2	3	4	
Project Management (days)	0	0	2	3	5	
Training (days)	2	3	5	10	18	
Annual Maintenance/Support Charge	£747	£1159	£2704	£4764	£8369	
Maintenance included in year 1	-	-	-	-	-	

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	£443	£783	-	-	-	
Maintenance included in year 1	-	-	-	-	-	

User Base

ALPHALAW VANTAGE		1-5	6-20	21-40	41-75	75+	Top 100
Total firms 342	FIRMS	99	116	78	40	8	1
Total users 6350	USERS	288	1069	1969	1799	1045	180
ALPHALAW ESPRIT		1-5	6-20	21-40	41-75	75+	Top 100
Total firms 807	FIRMS	701	106	-	-	-	-
Total users 2042	USERS	1237	805	-	-	-	-



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

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 MEEHAN
Managing Director

Our unprecedented first place for the third year in row for Overall Customer Satisfaction and being the Number One Provider (and also winning the Best Solicitors' Software Users Award from the Institute of Legal Cashiers and Administrators), validates our continuing efforts and truly indicates a vote of confidence from the people who count most – AlphaLAW customers.

Being rated first in 2005 and 2006 has made us work even harder to give our clients the best software solutions and service in the industry, with new products offering more performance, more productivity, more profitability, more reliability and even more return on their investment.

We ensure that you receive the best software and services that make the most sense for your legal business, technically and economically, from controlling the total cost of ownership to helping you manage new capabilities and services.

We will continue to focus on understanding each and every one of our customers' unique business needs and maintain our commitment to providing our customers with easy to use, best-in-class solutions, services and training so you are equipped to fully maximise your firm's performance.

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1-5

6-20

21-40

41-75

75+

Top 100

AlphaLAW VANTAGE AND ESPRIT

Independent View

Cognito Software PracticeManager

Back in February, Cognito Software launched version 9.0 of its eponymous case and practice management software, bringing its long-established product suite up to date with the latest trends in the legal software market. Version 9.0 offers broadly similar enhancements for Cognito Case Manager, PracticeManager and the Custodians trust and probate system.

i-View

The big news is that Cognito now offers a 'matter-centric' view of fee-earners' work. Thus, lawyers using the system can now see all documents, emails, case notes, time recording data and contact information relating to a case on a single screen – essentially, i-View is the electronic equivalent of the good old manila case file. The i-View screen also displays 'live' case and practice management data, drawn from Cognito's databases, as graphs and pie charts.

While primarily intended for individual fee earners, i-View can be tailored to the needs of individual users (for instance, it has been configured to help a marketing department run its campaigns) and can also be deployed as a high-level management tool.

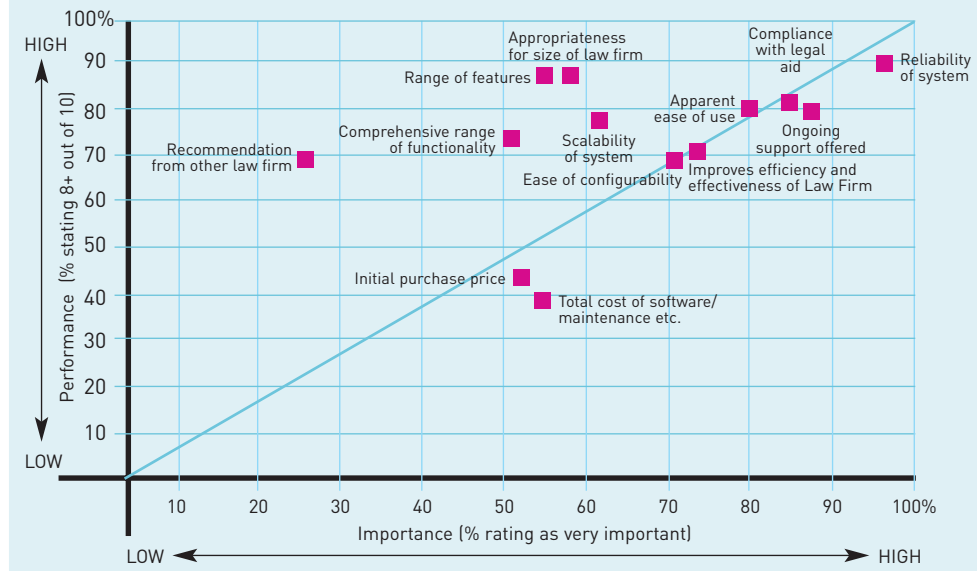
Email integration

Cognito's developers have integrated their product suite with Microsoft Exchange, which powers most law firms' email systems. Users can send and receive email messages from within Cognito; the system can be configured to automatically store emails in client-matter folders, and email templates are available within the case management workflow for easy drafting of standard letters.

Instant report retrieval

Another new feature in Cognito 9.0, the 'Instant Report Retrieval' function speeds up the process of retrieving management reports. Users can choose which of the 250-odd standard reports they want and create shortcuts in the application menu for easy access.

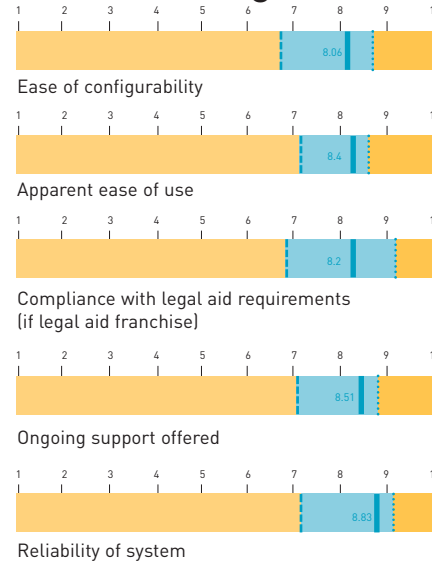
Product Performance Market research results



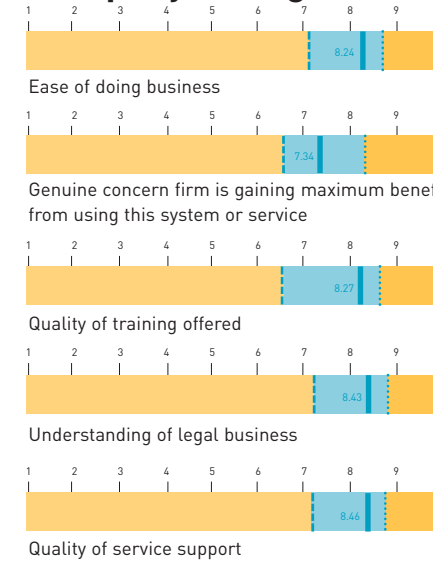
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Product Ratings



Company Ratings



LOWEST | THIS PRODUCT | HIGHEST

Panel Analysis

This is the first year for Cognito in the Guide, and the panel noted that its market research results reflected well on the firm. Positive panel mentions went to good links allowing rapid navigation between different parts of the system, good credit limit management, billing control by frequency, automatic conflict checking, trapping of emails, version control, good implementation of electronic chits, and the option of Web-based case tracking, though this currently lacks the ability to show documents.

On money laundering and conflict checking Cognito fared effectively; however, like many firms' software, the money laundering system can be ignored or worked around. The panel saw adequate variance analysis and, though not yet available, spreadsheets for cashflow forecasting. Cognito's system provides fee earners with a one-page summary called i-View which impressed; this replaces the contemporary user interface which remains in place for other users. Disaster recovery is sadly not a hot enough topic at Cognito's end of the market, which means firms in this sphere do not foist it on their customers – but this tango takes two to complete, and perhaps more push from both sides is required.

Overall, however, the panel was impressed with Cognito's attitude and drive, which no doubt contribute to its position in the Guide's rankings.

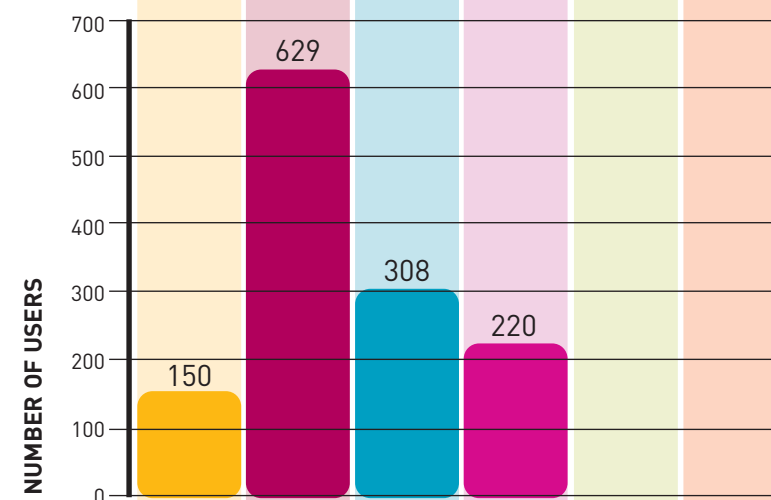
Product Pricing (Average cost per seat)

PRACTICE MANAGER

Number of Users	1	5	20	40	75	
Cost per seat (includes)	£3764	£1814	£1008	£912	£853	
Software Installation (days)	1	1	1	1	1	
Project Management (days)	0	0	1	3	3	
Training (days)	2	3	6	10	19	
Annual Maintenance/Support Charge	£684	£1984	£5244	£9148	£15,505	
Maintenance included in year 1	✓	✓	✓	✓	✓	

User Base

PRACTICE MANAGER		1-5	6-20	21-40	41-75	75+	Top 100
Total firms 115	FIRMS	55	46	10	4	-	-
Total users 1307	USERS	150	629	308	220	-	-



PRACTICE MANAGER	1-5	6-20	21-40	41-75	75+	Top 100
	✓	✓	✓	✓	✓	X

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



ROBIN LAVERY
General Manager

Originally developed by solicitors in 1991 as an accounts system, Cognito's PracticeManager software has evolved into a comprehensive practice management tool. The functionality provided is wide-ranging and includes auditing, risk management, document management, email and full reporting.

PracticeManager's core functionality can be extended by the addition of Case Management for conveyancing, debt collection, employment, family, personal injury and our market leading trust and probate solution, Custodiens®.

We are particularly pleased that the independent customer survey ranked Cognito highly in the areas of training and support. We see ourselves in partnership with users, helping them to achieve maximum efficiency from the system which then translates through to their clients.

In 2007, users can expect further performance enhancing features through Cognito Version 9.0 which includes i-View, a unique and interactive single screen that gives an overview of all related case activity. fee earners in particular can personalise the display to suit their preferred style of operation.

We look forward to strengthening our partnership with the Law Society and clients to further enhance the Cognito solution.

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1-5

6-20

21-40

41-75

75+

X

Cognito Software PRACTICE MANAGER

Independent View

DPS Software

A pledge to smooth the impact of the Carter reforms reaffirms DPS's commitment to supporting small criminal practices, but the company has clear ambitions to win more business from large firms. There's a lot of new functionality on offer and some major developments in the pipeline.

Document assembly

On the case management side of things, DPS has re-formatted all its document assembly templates in XML 2007. This allows the system to extract data from any Microsoft Office format – Word, Excel, even PowerPoint – to populate the templates automatically.

Immigration and employment

Two new case management applications are now available, designed to support immigration and employment practices.

100% functionality over the Web

Following last year's [2006] launch of a Web-based diary application, DPS has now gone one better, offering the full functionality of its systems over the Web for laptop users and a sensibly cut-down version for PDA users. Another Web Services development gives firms the option of letting corporate clients view the files and billing data within their matters.

Tighter integration

The case management and accounting components can still run as standalone systems, but these are now more fully integrated with each other and with the TeamTalk digital dictation system, which has been given a new Web interface and will soon boast its own security certificate. Fee earners can now use their mobile phones to dictate directly into the system. DPS has also integrated its case management software with the Thomson Elite and Pilgrim LawSoft practice management systems.

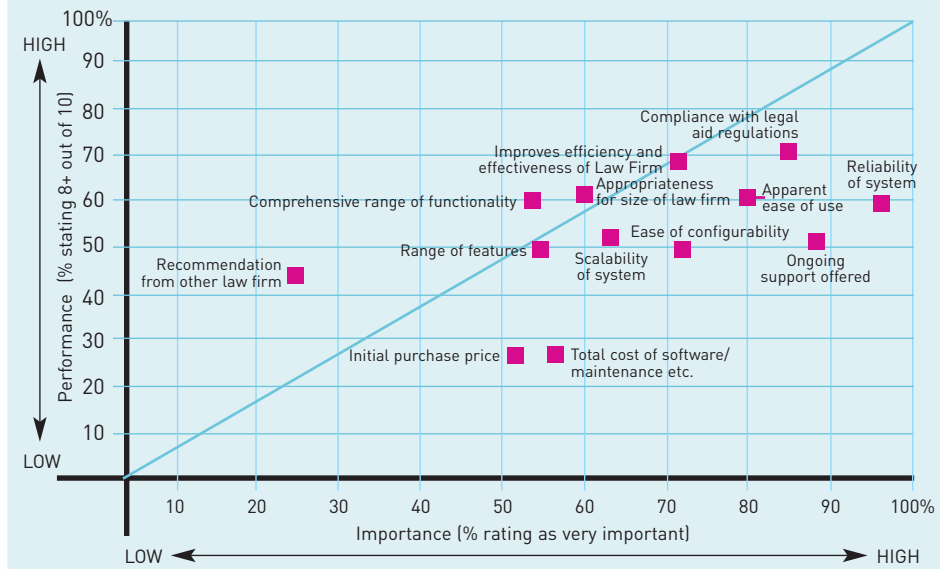
Automatic postcode search

Quick Address System (QAS), which automatically generates a customer's full address details from their postcode, is a useful business tool that has been around for years – but at considerable cost. DPS has now licensed it as a Web service, delivering QAS functionality for less money.

Vista and SharePoint

When Microsoft launches its next-generation Windows Vista operating system in January 2007, DPS will be offering a new user interface that effectively embeds its case management and legal accounts software within the standard Vista applications. Firms that want an industrial-strength document management system will also be able to run DPS's case management applications on top of Microsoft SharePoint, while those with less appetite for complex functionality can continue using DPS's own document management capabilities.

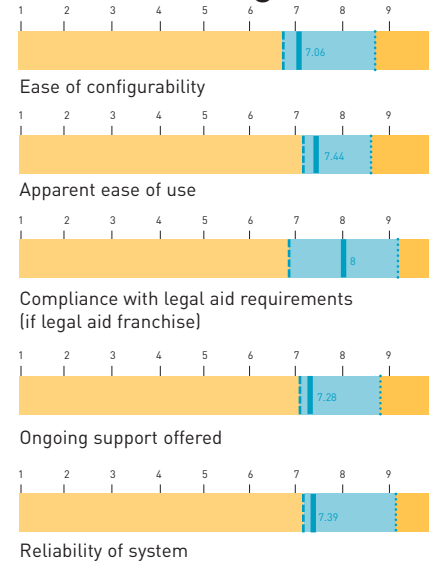
Product Performance Market research results



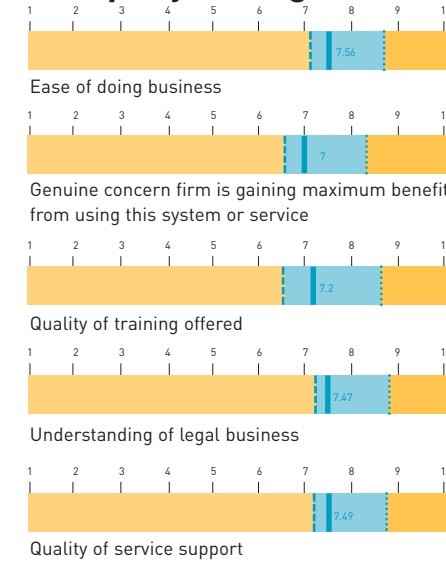
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Product Ratings



Company Ratings



LOWEST | THIS PRODUCT | HIGHEST

Panel Analysis

DPS is not alone in being a company whose market research results do not seem to reflect the level of technical innovation the company demonstrates. This may be down to over-providing to law firms that do not use software to its fullest, a surefire way for law firms to fail to recognise value for money. DPS has spent this year communicating more with its clients using downloadable 'mini-manuals' and setting up an online user forum, both of which the panel approved.

DPS was the only firm to have a written, three-tier business continuity plan to hand when interviewed by the panel. This is the document DPS uses, and it advises customers to do the same. The panel was very impressed with this vision. The panel also liked DPS's willingness to push law firms into making mandatory standard checks such as money laundering and conflict checking.

Mixed-mode case processing from user-driven to fully automated is high on DPS's list of selling points, and the system can be tailored to suit the individual firm, including the creation of highly automated document and process workflows. Full automation can be a mixed blessing if law firms do not have an appreciation of when intervention might be necessary in their workflows but, overall, elements such as automatic tagging and trapping of outbound and inbound emails, auto file creation from emailed instructions with automated alerting to the fee earner, highly comprehensive conflict checking and a very flexible underlying structure all point to a firm that understands that its client base needs high efficiency. This does mean, however, that the fully

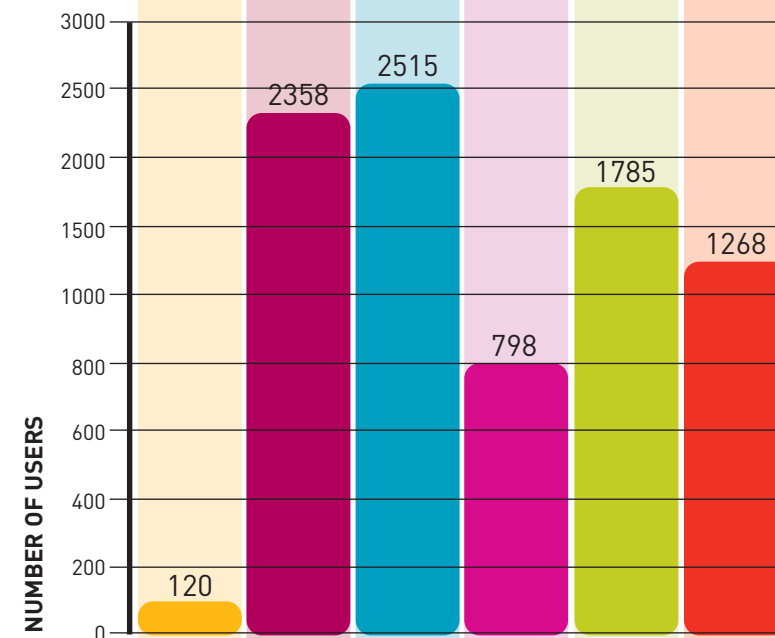
Product Pricing (Average cost per seat)

DPS SOFTWARE

Number of Users	1	5	20	40	75
Cost per seat (includes)	£150	£120	£1200	£900	£600
Software Installation (days)	0	1	1	1	1
Project Management (days)	0	1	2	2	2
Training (days)	0	5	8	12	36
Annual Maintenance/Support Charge	inc.	inc.	£240	£180	£120
Maintenance included in year 1	✓	✓	✓	✓	✓

User Base

DPS SOFTWARE		1-5	6-20	21-40	41-75	75+	Top 100
Total firms 366	FIRMS	50	158	125	15	15	3
Total users 8844	USERS	120	2358	2515	798	1785	1268



DPS SOFTWARE

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



OSMAN ISMAIL
Managing Director

OneOffice from DPS brings together all the key functions in a practice. We have already built workflow modules for Property Purchase, Sales, HIPs, Remortgage, Personal Injury, Family, Criminal and General Litigation. The implementation of OneOffice can be fast.

DPS offer a Crime module that includes CDS and Crown Court billing and reporting. The software is uniquely positioned to be ready for the changes brought about by the Carter reforms.

All the case modules integrate straight into our accounts system, Cashier, and so share client, contact and matter details. This method also avoids any need to re-key bills or disbursements that have already been raised in case. Ledger cards can be viewed and printed from case by any case user, avoiding the need to call accounts and ask for print-outs.

The HIPS module is Web-based and allows a potential or existing client to enter instructions that are captured back in the office. The case can then be automatically created on the main database and any opening letters or documents emailed or sent by the system 'robot'.

Fully integrated to Outlook, sharing appointments, tasks, and emails the system is simple to use and the 'Case Robot' can do tasks automatically or have work delegated to it.

It can also if required be operated entirely from within Outlook and on the internet. The functions of OneOffice become Outlook buttons that allow the user to send and receive emails, make and amend appointments or tasks against cases. They can also view ledger cards or electronic files, raise cheque requisitions, record time, or amend clients matters and contacts, all against a case.

Written in Microsoft's .NET, OneOffice uses a fully scalable MS SQL database as its data source and is fully tested with SQL version 5.

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1-5

6-20

21-40

41-75

75+

Top 100

DPS Software DPS SOFTWARE

Independent View

Eclipse Legal Systems Proclaim®

Eclipse has long been a provider of 'best of breed' systems, as well as integrated practice management. But that once-great debate between best of breed and integration in the legal market might soon be moot, as the world of 'mainstream' business looks to developments such as 'Web Services' (essentially, tying software heavily to Web elements), which are quickly becoming a reality. The future may be one where law firms compete with MDPs or need to link into supply chains, and Eclipse's development strategy seems increasingly focused on this brave new world.

New look and feel

Eclipse's latest software, Proclaim® v3, packs in a lot of enhancements, including an entirely new 'look and feel' for the software. From the user's perspective, it now looks like Microsoft's new Windows Vista operating system, which also prepares it well for law firms' upgrade paths.

Presenting tools and data

Appearance aside, new features in Proclaim® include a document preview function and a favourites list that works rather like the bookmarks in a Web browser: a handy place to store frequently used reports and task reminders for quick and easy access.

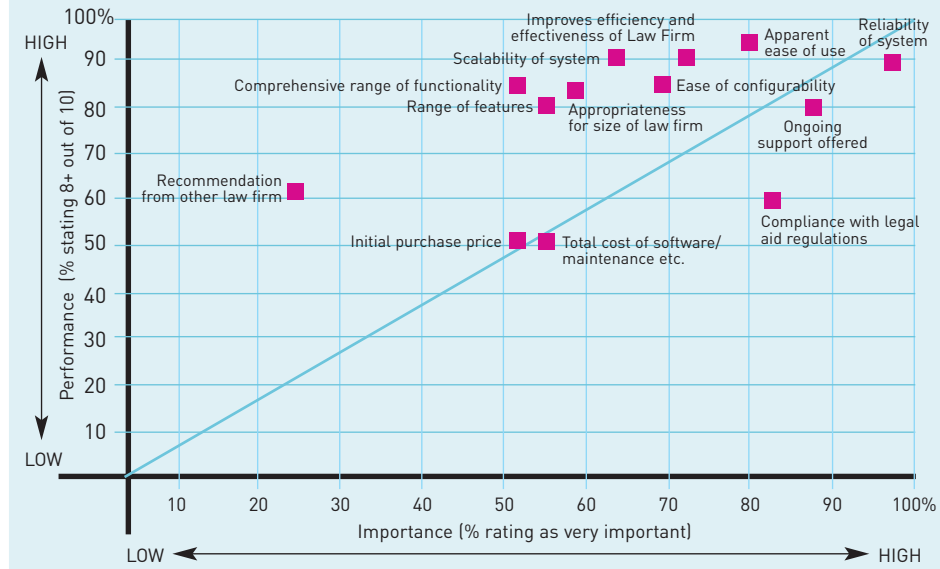
Financial integration and beyond

Behind the scenes Proclaim® has effectively been rebuilt from the ground up, ready for a Web services future. This means Proclaim® can automatically share data with clients' financial systems, and could hook into an inter-firm referrals system, for example, or expose case management data to clients by feeding it straight into their own systems and letting them watch their matters take shape.

DDS hook-ins

Also worth mentioning is Eclipse's recent alliance with BigHand, which should soon see digital dictation workflows built into Proclaim®.

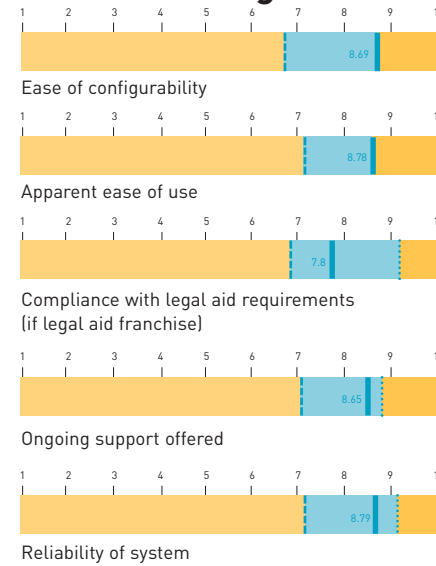
Product Performance Market research results



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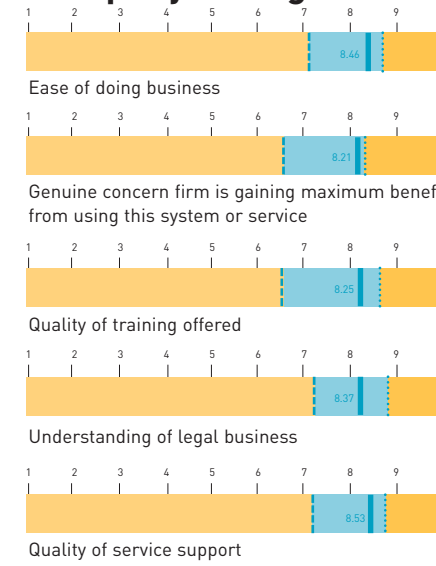
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Product Ratings



LOWEST | THIS PRODUCT | HIGHEST

Company Ratings



Panel Analysis

Not every firm elicits the words 'enthusiastic and expert' from the Guide's panel, or management jargon such as 'thought leadership'. In areas such as disaster recovery/business continuity and 'Web Services' elements, Eclipse is trying to pull forward its customer base to match the best practice of its top-end clients, something the panel likes to see. This extends to following up post-installation with a written 'health warning' if advised best practice settings are not followed. Eclipse also scored highly in terms of customer relationship management functionality, with 'powerful' querying and 'easy' mail shots. Email integration was also impressive, with automatic filing according to matter numbers embedded in emails and incoming mail presented as tasks for fee earners.

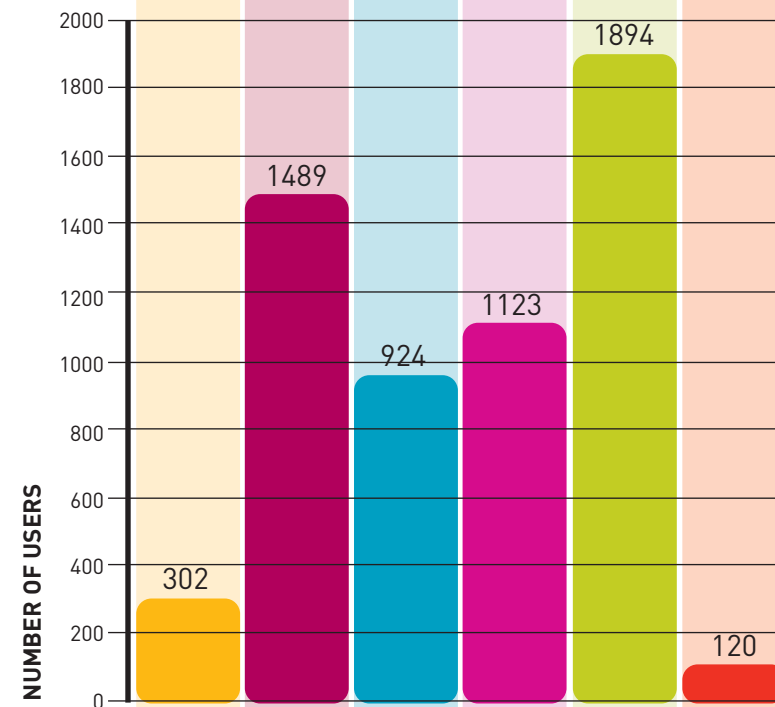
The panel also noted good company knowledge of Clementi reforms, as well as application of this knowledge by Eclipse's move into commercial organisations as well as 'traditional' law firms.

Product Pricing (Average cost per seat)

PROCLAIM®	1	5	20	40	75
Number of Users	1	5	20	40	75
Cost per seat (includes)	£2850	£1810	£1499	£1485	£1485
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 279	FIRMS	98	112	31	20	13	5
Total users 5852	USERS	302	1489	924	1123	1894	120



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. Client numbers have soared, and the range of practices and work areas that we serve (conveyancing, personal injury, crime, employment, family, debt recovery, probate, etc.) is unmatched in the legal IT market place.

Proclaim® Case Management software is in use by thousands of partners, fee earners and support staff. Our extremely strong showing in this year's edition of the guide is testament to a focus on delivering software solutions that provide real day-to-day and bottom line benefits. By taking the time to ask our clients what they want – and ensuring that we meet and exceed their expectations – Proclaim® has gained an unsurpassed reputation for functionality, ease of use and flexibility.

Uniquely, Proclaim® can be implemented in a huge range of organisations: practices spread over multiple sites with hundreds of staff; high-street firms wanting a departmental solution; and new start-ups of just one or two users.

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

Contact Details

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1-5

6-20

21-40

41-75

75+

Top 100

Independent View

JCS Computing Solutions LegalLedger FiLOS

The capabilities of JCS's contacts-management application, the Client Practice Database, have been expanded, making it easier for users to slot in third-party experts alongside clients.

More searches

Also expanded is the search capability within LegalLedger's case management system, which can now pull in data from both Searchflow and Land Registry, among other places. JCS has also built a Web browser into the case management system, so users can conduct their research online without having to leave the application.

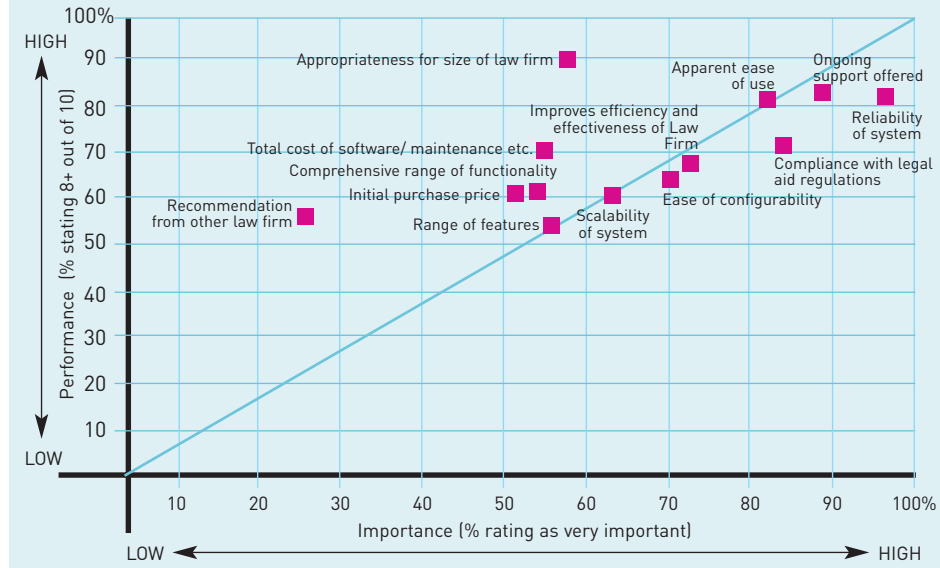
Client extranet

WebCase is JCS's new client extranet. Clients can check the progress of their matters online (this is used to good effect by a firm that does bulk remortgaging work). WebCase can also function as a more sophisticated extranet for intermediaries, such as mortgage lenders.

Text message alerts

A new SMS text application was designed to overcome the problems experienced by criminal practices, which couldn't use the 'normal' case management-driven SMS alert systems on the market because they needed proof that messages sent were actually received on the client's mobile phone handset – not just received by the phone service provider. JCS's system gives them a receipt of delivery and claims a success rate of 95-98%.

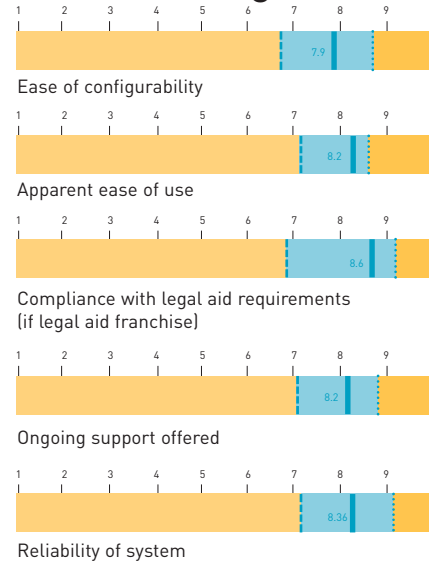
Product Performance Market research results



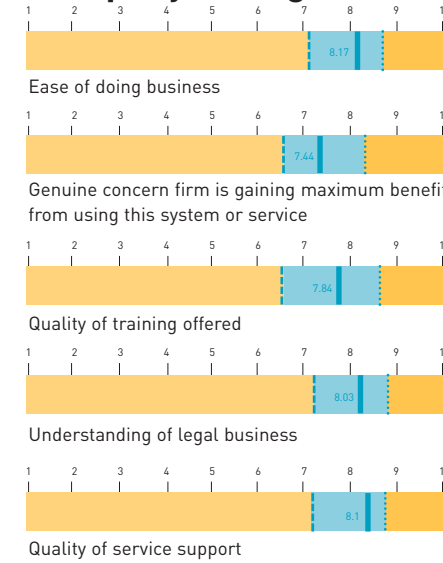
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Product Ratings



Company Ratings



LOWEST | THIS PRODUCT | HIGHEST

Panel Analysis

JCS keeps the small firms it serves happy with superficially uncomplicated, 'tried and tested' solutions. This year it has added exception reporting for conflicts, bank reconciliation and money laundering ID checks. Though JCS's interface is not the most modern compared with the increasing number of others that ape Microsoft's Windows XP and Outlook 2006, customer research backs its continued use for doing 'what it says'. JCS is in a dwindling number of companies not taking the .NET route, but it remains convinced that this provides a choice firms will want to have.

For a company whose user base is in the 1-5 user bracket JCS are surprisingly and comfortingly 'evangelical about business continuity', the panel found. Though JCS said it finds it difficult to get clients to take it seriously, it has managed to move 40 or more customers to offsite backup/data restoration, compared to just four last year, and JCS works hard convincing customers of the importance of tape backup verification. This kind of IT leadership impresses the panel, as did the system's request for re-entry of passwords for important steps, a good cashflow forecast tool, and some vision for the future of small firms, such as SMS texting capabilities.

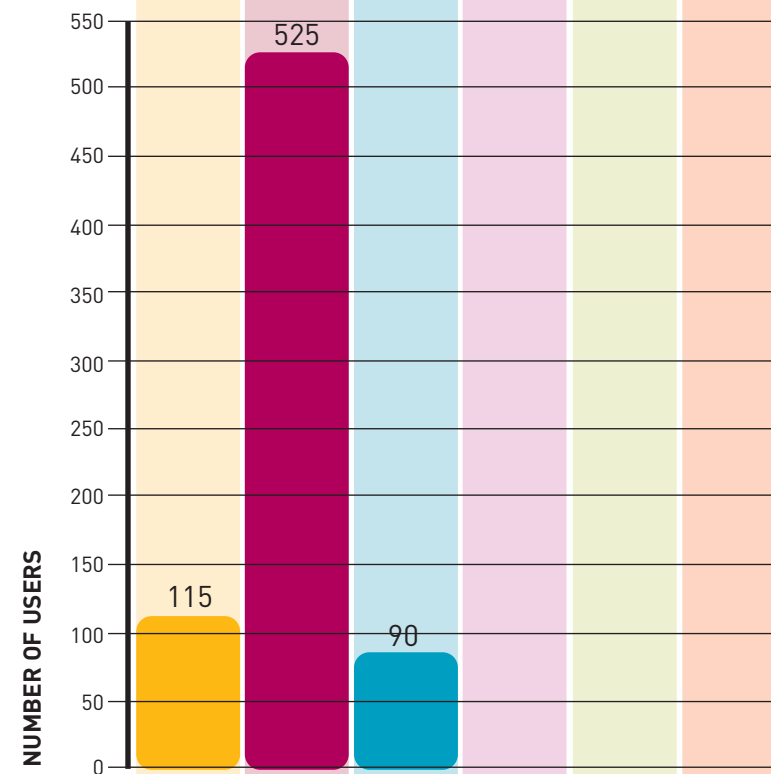
Product Pricing (Average cost per seat)

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	£1055	£2900	£5530	-	
Maintenance included in year 1	✓	✓	✓	✓	-	

User Base

LEGAL LEDGER FILOS		1-5	6-20	21-40	41-75	75+	Top 100
Total firms 186	FIRMS	56	126	4	-	-	-
Total users 730	USERS	115	525	90	-	-	-



LEGAL LEDGER FILOS	1-5	6-20	21-40	41-75	75+	Top 100
	✓	✓	✓	✗	✗	✗

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

A busy year! Increasing links to third parties such as LMS, the LSC, NLIS portals, the Land Registry and SMS texting services. Also, more control and built in non-compliance warnings help clients conform to the regulatory requirements of the Solicitors Account Rules, Rule 5 and HM Revenue & Customs.

These enhancements have been made with one focus in mind: the ever-increasing demands made upon law firms by e-business and regulatory control.

We mentioned last year that key drivers in the legal sector were forcing law firms and their software suppliers to work ever more closely together. This is turning out to be true and, over the years to come, you will come to depend more and more on the accounting, practice management and case management software that you deploy as part of your business process.

To do this successfully, you must have good, reliable software from a good, reliable company. We are pleased that this year's customer satisfaction survey demonstrates that not only do LegalLedger and JCS fall into this category but, once again, both have improved in the key performance indicators.

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Fax: 0121 543 6997

1-5

6-20

21-40

✗

✗

✗

Independent View

Linetime Liberate

Recent months have seen some innovative thinking from Leeds-based Linetime, following a major push on the development front.

Matter management

The big news from Linetime is the launch (and subsequent upgrade, last April) of Liberate Express, a matter-management system that, from the user's perspective, works from within Microsoft Outlook. Matter files are displayed in Outlook, putting emails, scanned images, letters, faxes and other documents in the same place, alongside practice management data. Training is a breeze for anyone who uses Outlook – and let's face it, that includes most people who work in law firms.

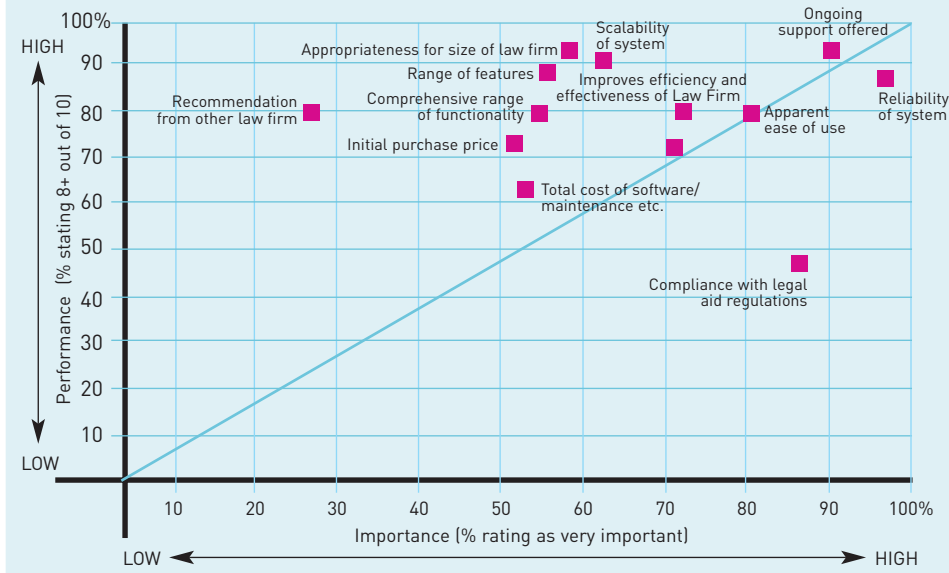
Matter management systems deliver all the productivity tools of a 'normal' case management system, but without the rigid, prescriptive workflows that tend to leave solicitors engaged in complex, client-focused work feeling frustrated and hamstrung. Rather, systems like Liberate Express work behind the scenes, storing and organising their work.

An enlightened approach to software licensing

Buying software is always a leap of faith but a new optional licensing scheme from Linetime reduces the upfront costs. Customers are billed in arrears, with Linetime charging a flat fee for each transaction completed by fee earners using the system. You still have to pay in advance for the installation and training fees, though, and at the time of writing this option only applies to the Debtime SQL product, but it's a novel concept nonetheless and one that Linetime has pledged to roll out across its entire product suite.

Linetime never really bought into the 'best-of-breed' concept, where law firms cherry-pick their favourite applications from various vendors and then try to knit them together into a coherent practice solution. Now the pendulum seems to have swung back in favour of all-in-one systems, with Linetime seeing the benefits – their latest figures show a 75% surge in profits, which can only reassure prospective buyers vis-à-vis its position in the market.

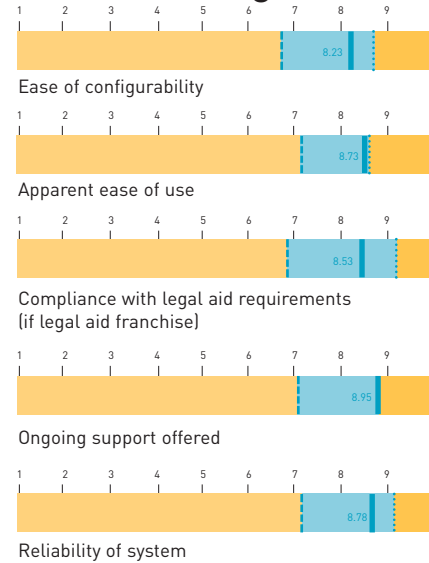
Product Performance Market research results



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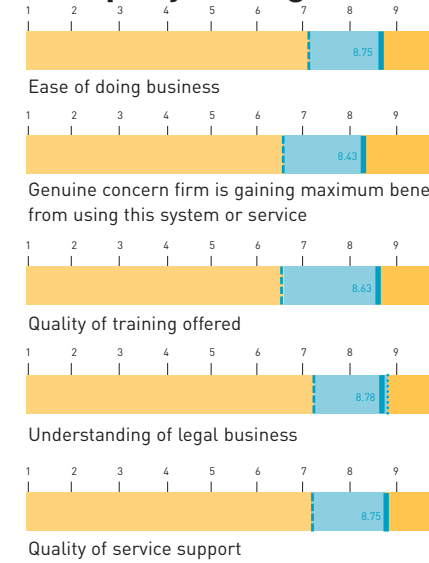
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Product Ratings



LOWEST | THIS PRODUCT | HIGHEST

Company Ratings



Panel Analysis

Linetime's climb to the top of the Guide's market research is a point of understandable pride, and is likely down to very strong 'soft' skills and attention to customer needs over producing great innovation – in itself, no bad thing. Linetime is seeing payback from extensive .NET development, which helps towards the 'very good' customer relationship management, 'good' reporting to identify the effectiveness of marketing activities, and a noted Web element that lets firms change their websites themselves. These things take thought, however, and the panel was also impressed by Linetime's commitment to continuous improvement and the company's 'professional attitude and approach, and their humility'.

Liberate Express is the latest addition to Liberate. Express is an Outlook-alike front-end which offers ease of use if not great difference, but the new interface refreshes Liberate and should mean useful future Web development with a well-known look. The panel noted that it might be confusing to run both Outlook and Liberate Express simultaneously. But Linetime is certainly coming up with fresh ideas as well as keeping customers happy, including an interesting 'disclosure' facility which allows production of single Adobe PDF files from multiple selected

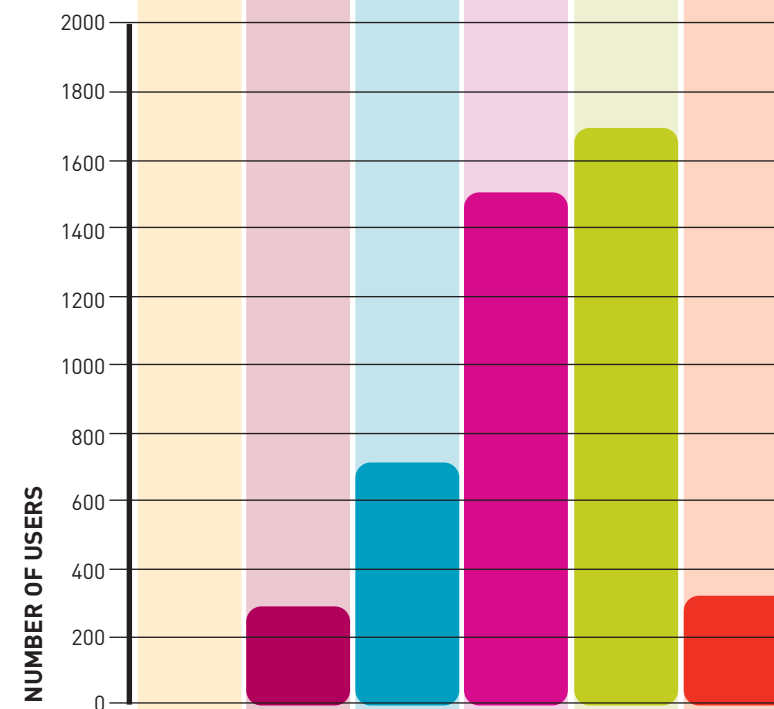
Product Pricing (Average cost per seat)

LIBERATE

Number of Users	1	5	20	40	75
Cost per seat (includes)	-	£2100	£950	£800	£625
Software Installation (days)	-	1	1	2	2
Project Management (days)	-	1	1	2	2
Training (days)	-	6	11	16	23
Annual Maintenance/Support Charge	-	£1300	£2400	£4800	£7300
Maintenance included in year 1	-	✓	✓	✓	✓

User Base

LIBERATE		1-5	6-20	21-40	41-75	75+	Top 100
Total firms 113	FIRMS	-	34	29	34	13	3
Total users 4635	USERS	-	318	734	1512	1701	370



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 delighted to be ranked number one in this year's guide and feel this is a testament to the quality of our people, solutions and services. It indicates that our clients are benefiting from our relationship – as we grow, they grow.

Our broad philosophy is to maintain a complete portfolio of software solutions. We have always targeted the core areas of functionality but now cater for an increasing list of specialist functions. These range from compliance, client verification (assisting money laundering checks) right through to comprehensive CRM and a cost-effective paperless office. Because our technology is based around Microsoft and the .NET framework, we are finding it readily links with NLIS channels, panel referrers and digital dictation etc.

Our base systems are proven and robust – giving a solid platform to build upon. We believe that this, along with our dedication to customer service, is the key reason behind our success and our number one position. Whether a practice has four or 400 users, we hope that our approach continues to be as popular as the survey indicates.

Linetime LIBERATE

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6-20

21-40

41-75

75+

Top 100

Independent View

LPS

At a time when most software vendors are busily bolting extra functionality onto their systems and focusing their efforts on making their product suites ever more sophisticated, more powerful and in some cases, more complex, it is interesting to see LPS adopting a different strategy.

Less is more

LPS has devoted its development resources to simplifying its existing products – even to the extent of cutting back on non-essential functionality – to better serve the small and medium-sized high street practices that make up the lion's share of its user base. The prime focus for LPS's developers has been on making the core systems easier for small firms to install and maintain. The standard build for each product is now pre-configured to a much greater extent, which will suit firms that do not have in-house IT staff to support them.

From workflow control to matter-centric systems

LPS's case management system was originally conceived as an effective means of imposing prescriptive workflows on fee earners. Though you can still have this, the emphasis is now on providing users with a 'matter-centric' view of their work. Partnership Suite comes with a document library of over a thousand Microsoft Word templates for standard letters and other documents, covering all major work types, which will enable small firms to roll it out across all practice areas rather than having to install differently configured systems for each practice area.

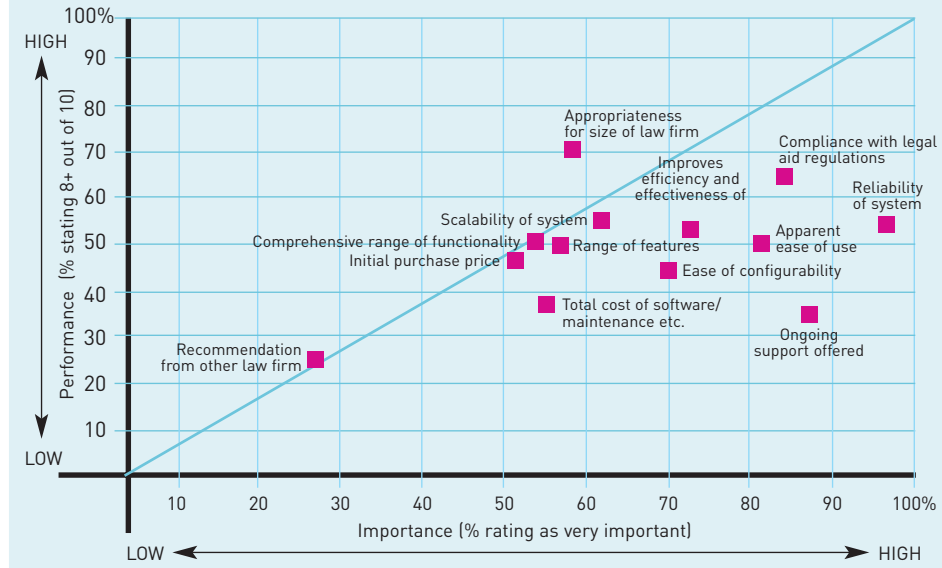
Tangible refinements

Other refinements include tighter integration with CS Group Laserform's popular online legal forms, a better search facility to help users to find what they need within a case history, and two-way integration with Microsoft Outlook, which ensures that tasks and calendars are automatically updated.

Alliance with AIM

Both AIM and LPS were bought out in 2006 by CS Group, a large IT supplier. This is good news for users on several counts: firstly, the two companies are able to pool their support and development resources, which should lead to better customer service. Secondly, the two suppliers are working together to ensure easy upgrades from one system to another, for firms that grow or merge.

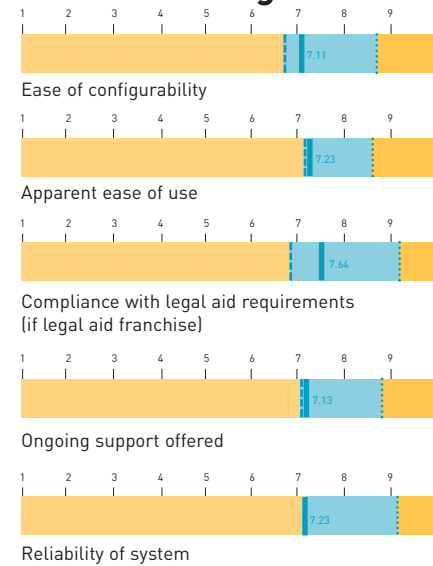
Product Performance Market research results



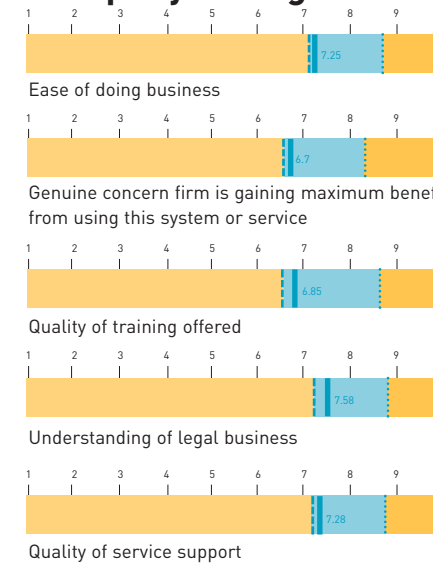
The Importance/Performance Ratio is a visual representation of each provider's performance on a range of product and company attributes in the context of what's important to the legal profession more generally.

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

Product Ratings



Company Ratings



LOWEST | THIS PRODUCT | HIGHEST

Panel Analysis

LPS is another of the firms bought by CS Group this year. There is a 'strong emphasis on simplification rather than features', noted the panel, which supplements a system that comes pre-populated with comprehensive precedents, which impressed. LPS has also created links to conveyancing search portals, allowing for integration to HIP products.

The Outlook-alike layout is familiar, with incoming and outgoing emails saved into the matter manager. Users have the discretion to delete, which should be switched off if at all possible. Anti-money laundering and conflict checks are optional, though the panel's view is that best practice would be for mandatory checks. But money cannot be posted to the ledger if ID checks have not taken place, which is good. Data input appeared 'straightforward' to the panel.

LPS hopes to move forward strongly under GS Group's wing. Though not talking points for the smaller practice yet, the panel hopes that CRM, document management, online elements, better client account reconciliation and version control and a push to mandatory checks will be part of that development.

Overall the panel noted that 'at the right price and with the correct implementation decisions taken on installation, smaller practices could still derive substantial benefit from choosing to install LPS'.

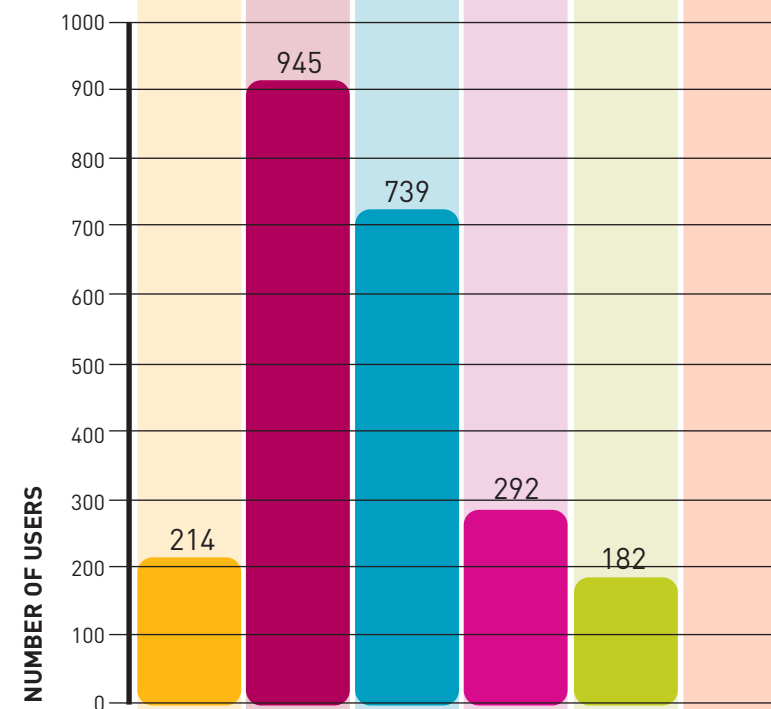
Product Pricing (Average cost per seat)

LPS

Number of Users	1	5	20	40	75	
Cost per seat (includes)	£5500	£1400	£850	£690	£640	
Software Installation (days)	0.5	0.5	2	4	6	
Project Management (days)	0.5	0.5	2	4	6	
Training (days)	4	4	7	9	18	
Annual Maintenance/Support Charge	£695	£950	£2500	£4200	£7000	
Maintenance included in year 1	-	-	-	-	-	

User Base

LPS		1-5	6-20	21-40	41-75	75+	Top 100
Total firms 191	FIRMS	73	84	26	6	2	
Total users 2377	USERS	214	945	739	292	182	



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

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



STEVE CHIVERS
Managing Director

LPS are part of the exciting, fast-growing Computer Software Group, already the largest supplier of software to solicitors in the UK. With 550 employees, 16 offices and over 3000 legal customers the CS Group are perfectly positioned to assist with all your needs.

With our flagship product, The Partnership Suite, we have consciously avoided the 'one size fits all' approach and concentrated on providing systems designed and configured for small to medium practices. The clever bit is that we still provide the large firm functionality, without the need for big firm infrastructure to install and get it up and running.

This has been achieved by designing software to work how you work and installing as much pre-configured data as is possible, including 1,200 Word documents, integration to the major Laserform forms, over 1,000 work type-specific data fields for all the major work types.

The document production within The Partnership Suite follows this approach with a simple but powerful method of producing and storing documents, forms, scanned documents, emails etc. all fully integrated with Microsoft Office and stored within a single MS SQL database.

With support and training services to match, CS Group LPS provide the perfect solution for small to medium firms that want to compete in this rapidly changing market.

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1-5

6-20

21-40

✗

✗

✗

LPS THE PARTNERSHIP SUITE

Independent View

Mountain Software

As much as any company featured in the Software Solutions Guide, Mountain Software has been busily raising its game – which is not to disparage its excellent track record, but rather to point out that this developer is going places.

The .NET advantage

Last year's major developments have delivered a wide range of enhancements and some useful-sounding new applications. Above all, though, the .NET platform makes it far easier for firms that have used the software in a small way to become more ambitious and sophisticated in their deployment of the system, perhaps rolling out the product suite across their whole practice.

A major plus on the usability front, at least for some users, is the ability to run the whole thing from within Microsoft Outlook. A new draft billing application also promises to make fee earners more efficient.

Versioning, searching, dragging and dropping

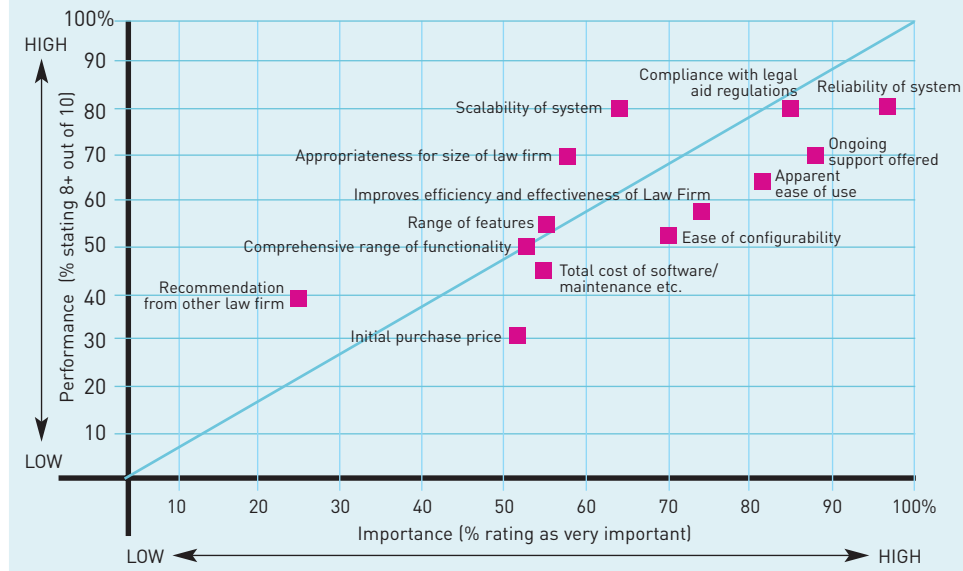
The Mountain Software Connected suite features all-new document versioning capability, along with a powerful search-engine. Users can also drag-and-drop files and folders to transfer them from one application to another – moving an entire document history between Microsoft Outlook and Mountain's practice management system, for instance. Working in concert, these new features make it much easier for users to file, organise and retrieve their documents.

HIP by-products

There is some doubt as to the future of the government's home information packs (HIPs) initiative for residential conveyancing, but Mountain's developers have turned the technology they created to support the production of HIPs to other uses. For example, upon completion of a matter for a commercial client, fee earners can burn the entire case bible onto an easily searchable CD, rather than presenting the client with a stack of box-files. Equally, the scanning solution developed with HIPs in mind can be deployed as a full-blown postroom facility.

Looking to the future, Mountain's dominant position in the markets for barristers' and coroners' systems may well enable it to offer full Web Services integration and automated data exchange capabilities between solicitors' practices, coroners' offices and barristers' chambers. Watch this space.

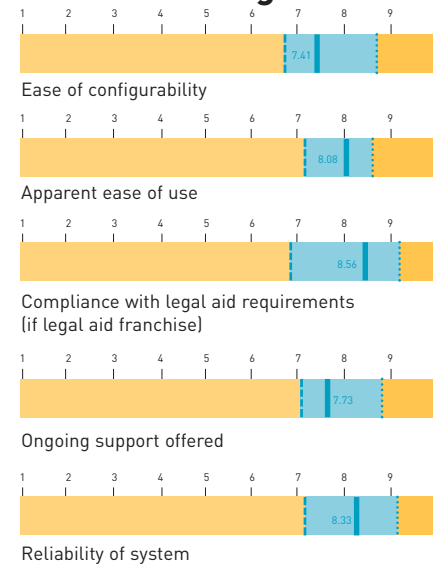
Product Performance Market research results



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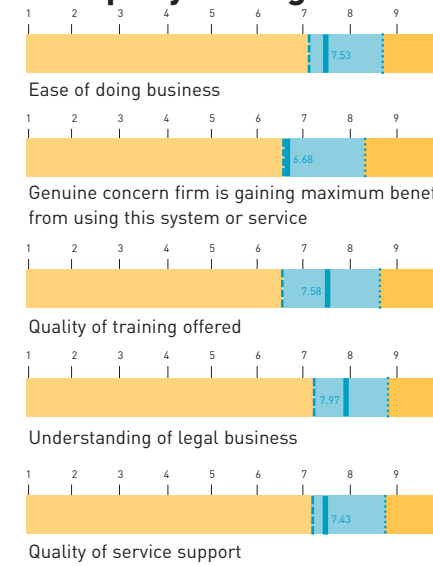
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Product Ratings



LOWEST | THIS PRODUCT | HIGHEST

Company Ratings



Panel Analysis

Mountain has been developing strongly since last year, with the panel noting 'improved email integration' as well as drag-and-drop, and incoming emails which are replies to messages sent from the CMS now brought into the matter history. Also 'substantially improved' are version control on documents and cashflow forecasting. The addition of an online quotation system to allow for online instructions to be taken, and the new ability to generate 'bibles' on commercial transactions on CD impressed the panel, as did evidence that Mountain now better understands the impact Clementi will have on the way software could help the solicitor meet the competitive challenge ahead.

Mountain is also expectant about what Microsoft's SQL Server 2005 can do for its next software iteration, including enhanced customer relationship management and potentially powerful, user-definable reporting (using SQL 2005's built-in business intelligence elements), but even in its present incarnation 'its market success remains well deserved', noted the panel.

Product Pricing (Average cost per seat)

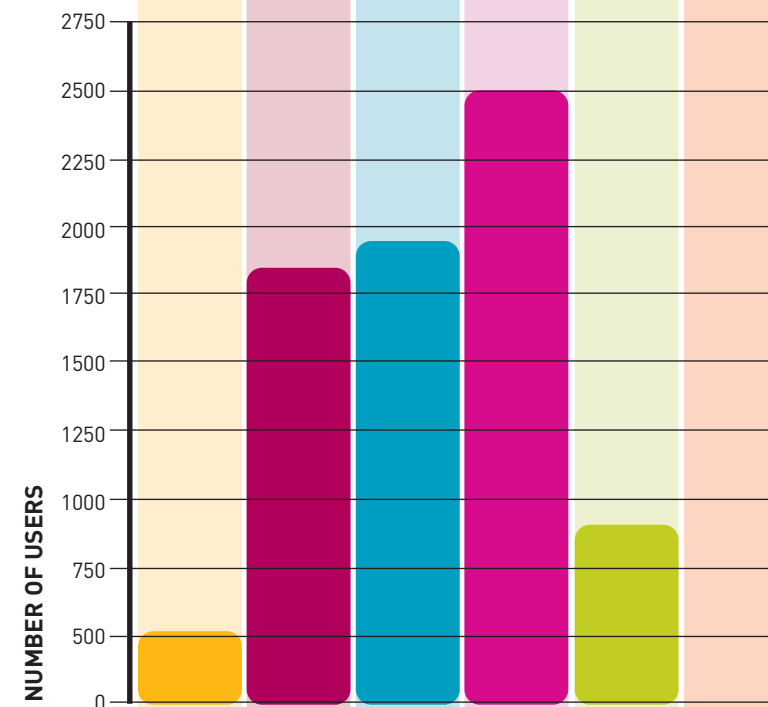
MOUNTAIN SOFTWARE CONNECTED PMS & ACCOUNTS & TIME RECORDING

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

MOUNTAIN SOFTWARE CONNECTED PMS & ACCOUNTS & TIME RECORDING

		1-5	6-20	21-40	41-75	75+	Top 100
Total firms 520	FIRMS	211	162	87	49	11	-
Total users 7644	USERS	574	1811	1936	2508	815	-



MOUNTAIN SOFTWARE CONNECTED PMS & ACCOUNTS & TIME RECORDING

✓	✓	✓	✓	✓	✓
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



STEVE KENDRICK
Sales & Marketing Director

Mountain Software is the only software house to be accredited every year in the Law Society Software Solutions Guide. With a pedigree of 25 years of uninterrupted innovation, Mountain Software continues to develop and support integrated software solutions for the legal profession. Our new Connected range of products is now available and offers a range of new features and is available as a free upgrade for our existing clients. Amongst the many new features offered are document scanning, enhanced cash flow production, greater integration with email and Microsoft Office, draft billing, electronic postroom facility, document versioning, improved document searching within document management including keyword searches, improved marketing facilities and a new internal mail facility from within the digital dashboard.

We also provide a range of case management solutions as add-ons to the Mountain Software Connected suite including: E-Conveyancing, Family, Personal Injury, Criminal and Probate. In addition, we also have a variety of online solutions available.

As well as having 750 plus solicitor practices as clients, we also support over 300 barristers' chambers and 110 coroners' jurisdictions.

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

Independent View

OP SIS

Millennium Accounts/
Practice Management System 2007/8 will see the release of a brand-new OPSIS product built on the Microsoft.NET platform.

Still nameless at the time of writing, the new system will offer users the choice of two interfaces to stare at: a 'normal' Windows view and a Web browser. Flippancy aside, this is useful. The new software architecture underlying the system will make OPSIS more powerful and flexible – and it will come in handy for home working too, as the browser version will, naturally, give full access to OPSIS's entire application over a normal domestic broadband connection.

Pay-as-you-go

Small high-street firms and start-ups may well find it worth their while to investigate a new 'pay-as-you-go' facility that has been built into the Millennium Accounts and Solo packages. Both are still available in the normal manner, but the new option rules out a lot of upfront costs. Instead, a fee is automatically billed to the firm as and when each matter goes live. For the brave, there is even a facility to charge these fees back to clients as disbursements.

Pay-as-you-convey

Property Matters is a new offering, borne of an alliance between OPSIS and the specialist conveyancing case management developer, ConveyanceLink, which have integrated their respective systems to create what is effectively an amalgamation of their products, working as a single, integrated system. As above, users pay a flat fee for each conveyance.

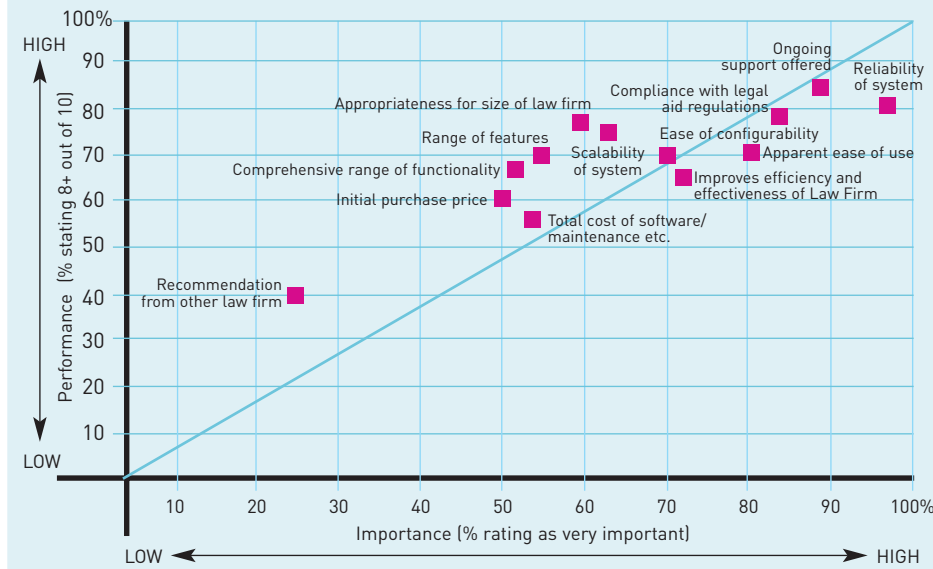
Case management

OP SIS now boasts two-way synchronisation between Microsoft Outlook and its case management system. In plain English, this means users can operate the case management system from within Outlook and use all the normal functions of Outlook from within the case management system.

Security

Authors of sensitive documents can now prevent unauthorised bods from looking at them; likewise, managers can ensure that only authorised staff can carry out certain tasks within the workflow of a case. If required, the system can force fee earners to save their documents in the right place by preventing them from being produced, used, saved or printed unless they're in there.

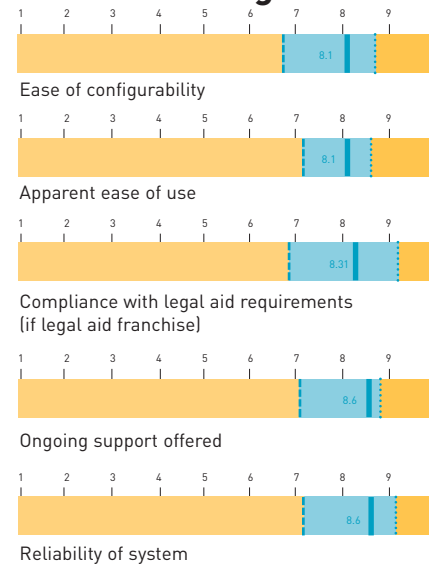
Product Performance Market research results



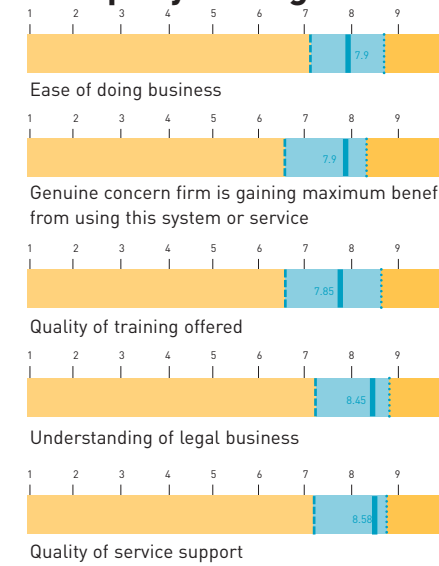
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Product Ratings



Company Ratings



LOWEST | THIS PRODUCT | HIGHEST

Panel Analysis

OP SIS has sold well of late which must have been comforting considering the amount of .NET development the firm has been working on, and the firm expects this to bear valuable fruit in 2007/8. The panel was very impressed with OPSIS's anti-money laundering and conflict checking, with automatic prompting and compliance warnings, and the ability to check against the client and matter database and extend checks to client/staff conflicts of interest, with extra 'continued diligence' functionality which the panel felt showed real vision. Every new client is automatically checked online against the Bank of England Consolidated Sanctions List. The panel sees these online connections as future 'must-have' IT elements.

Email has improved with a proper two-way link with Outlook and strengthened audit trails. The panel was impressed with the built-in conversion of standard Word documents to email format, as well as conversion to PDF. The panel was also impressed by the capability to make Word 'invisible' to prevent use of the software outside the CMS environment. OPSIS has also been busy with HIPs and compliance with the related PISCES standard, as well as links to search companies. Advanced stuff, overall.

Product Pricing (Average cost per seat)

OPSIS 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	32
Annual Maintenance/Support Charge	£800	£1200	£3245	£3980	£4950
Maintenance included in year 1	✓	✓	✓	✓	✓

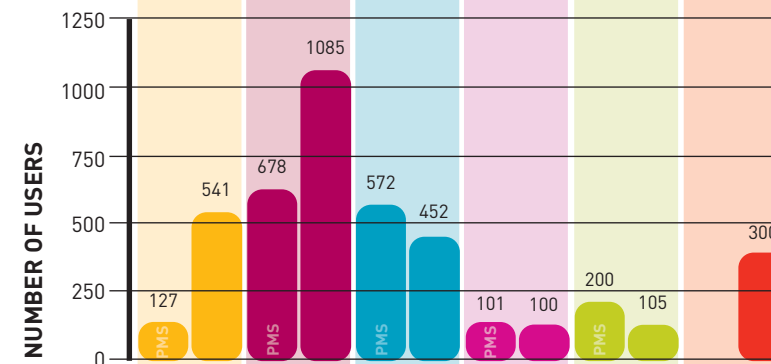
OPSIS MILLENNIUM ACCOUNTS

Number of Users	1	5	20	40	75
Cost per seat (includes)	£1740	£1107	£715	£609	£555
Software Installation (days)	1	1	2	3	4
Project Management (days)	-	-	-	-	-
Training (days)	1	2	5	10	19
Annual Maintenance/Support Charge	£480	£925	£1675	£2225	£4425
Maintenance included in year 1	✓	✓	✓	✓	✓

User Base

OPSIS PMS		1-5	6-20	21-40	41-75	75+	Top 100
Total firms 119	FIRMS	37	59	20	2	1	-
Total users 1678	USERS	127	678	572	101	200	-

OPSIS MILLENNIUM ACCOUNTS		1-5	6-20	21-40	41-75	75+	Top 100
Total firms 423	FIRMS	285	99	35	2	1	1
Total users 2583	USERS	541	1085	452	100	105	300



OPSIS PMS	✓	✓	✓	✓	✓	✗
OPSIS 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

In this year's Guide OPSIS yet again scored highly in the category of 'appropriateness for size of law firm', which is undoubtedly down to the fact that we have a product offering for all types of legal firms – from multi-site practices with hundreds of staff, high street firms who want a system for just a single department, to new start-up firms and sole practitioners.

In addition to our well established accounts, case management and practice management products, we have recently introduced an alternative 'pay-as-you-go' solution for accounts and conveyancing case management. With a fixed price, low entry cost, unlimited users and fast installation/set up, firms of all sizes can benefit from choosing Property Matters for their new system. No more ongoing annual licence fees and support costs – a simple fee per matter provides an innovative and cost effective solution.

OPSIS are constantly striving to improve our product offerings and services to our clients and we have a well-earned reputation for providing user-friendly, technologically advanced systems at an extremely affordable price.

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1-5

6-20

21-40

41-75

75+

Top 100

OPSIS PRACTICE MANAGEMENT AND SYSTEM MILLENNIUM ACCOUNTS

Independent View

Quill

Quill-Inhouse Legal

Quill's suite of back-office software, aimed squarely at small to medium-size firms and sole practitioners, offers an appealing range of features and a decent degree of flexibility – both in terms of remote access (for home-working, for instance) and in terms of configuration and deployment.

The remote-access capability might also be a useful solution for a firm comprised of a large number of small offices, where other methods of delivering legal office software may be prohibitively expensive or cumbersome.

Posting on before ruling off

Quill-Inhouse Legal has a number of stand-out features. For instance, it allows cashiers to post into a new month before they have ruled off on the previous month, neatly circumventing the otherwise inevitable log-jam that occurs at month- or year-end.

Selective searches

The system also features a decent search engine, which doesn't just search on simple keywords. Users can perform more sophisticated selective searches, to extract information from the database with greater precision.

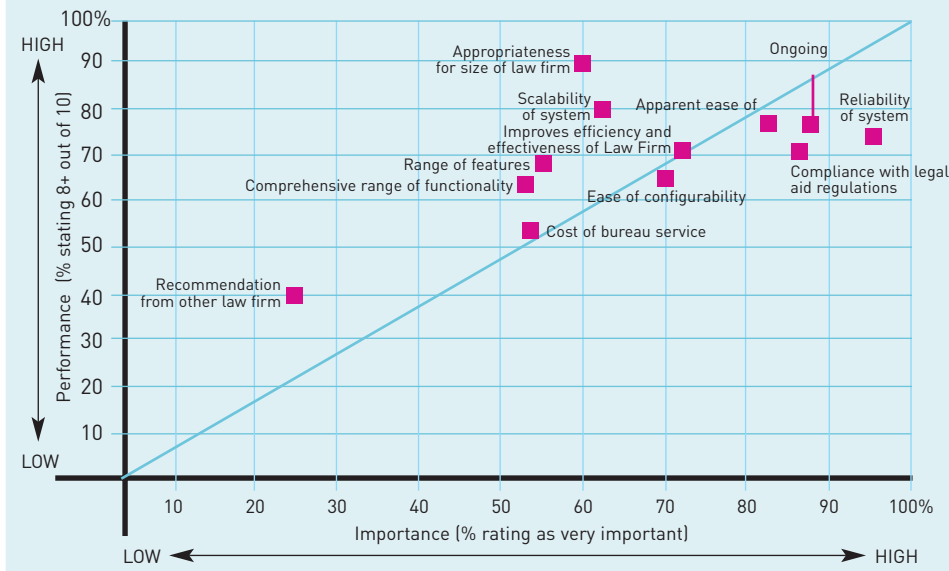
Happy returns

A VAT calculator and VAT audit control functions built into the standard Quill-Inhouse Legal product will automate most of the bookwork for a practice's quarterly VAT returns. Other efficiency boosters include part-automated bank reconciliation, thanks to the software's batch clearance and adjustment features, a full set of management reports on profits and costs, broken down by fee earner and by month, a client interest calculator, and automatic creation of audit trails.

Outsourcing service still going strong

If installing and operating all of the above sounds daunting, the alternative is to use Quill's Pinpoint outsourced accounting and payroll services. There is no initial set-up fee, or capital outlay, no annual software maintenance charges, no need to employ a cashier, and the contract doesn't lock you in long-term. If they do the maths, many firms might find it cheaper than trying to do everything in-house.

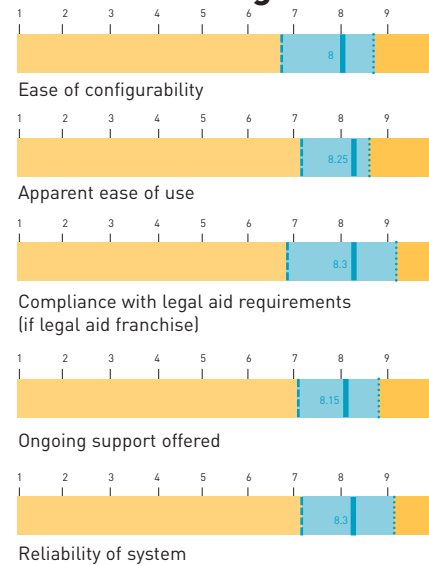
Product Performance Market research results



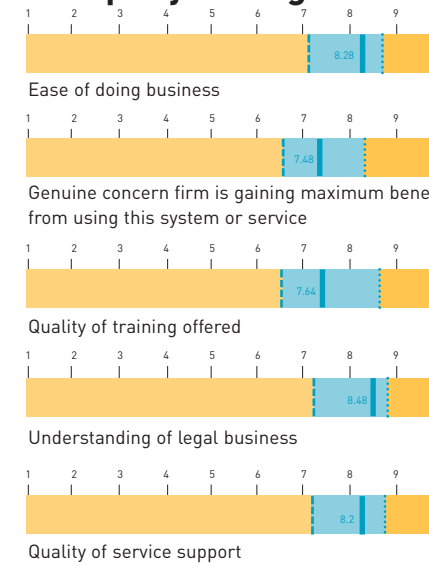
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Product Ratings



Company Ratings



LOWEST | THIS PRODUCT | HIGHEST

Panel Analysis

Quill's Pinpoint service deals mainly with small firms, helping them with accounts rules and practice management. It has a large criminal and civil legal aid client base, but medium-sized private firms also use it. Over the last year Quill has moved with the times, and now almost all the clients of Pinpoint access their systems over a secure Internet connection.

A .NET-based browser-fronted version of Quill's service is being rolled out, which the panel welcomed as bringing in a new 'clean and simple' interface. Quill promises to complement this with a Microsoft Vista and Office 2007 suite of applications. The panel also found a 'good implementation' of electronic chits impressive. Quill is the only firm in the Guide without their own case management system, but this role can easily be satisfied by integration with Opsis and other Microsoft Web Service-compatible systems.

It should be noted that firms outsourcing in this way should take a long, hard look at their and their supplier's disaster recovery and business continuity plans, as a non-recovery of data would have great effect.

All in all, the panel noted that Pinpoint is 'fulfilling a real practitioner need', and Quill evidenced 'they are thinking laterally in order to support firms who wish to outsource further core functions to remain competitive'.

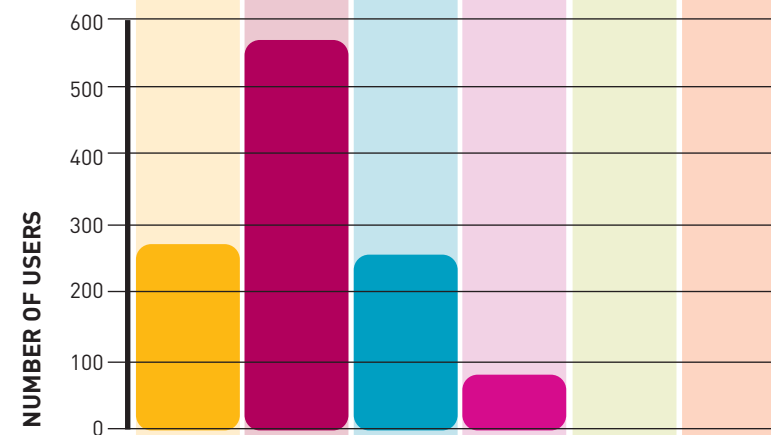
Product Pricing (Average cost per seat)

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 trial 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 174	FIRMS	106	56	10	2	-	-
Total users 1205	USERS	284	579	256	86	-	-



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



TONY LANDES
Managing Director

To take a previous quote from the SSG Independent View: 'I really think that more firms should seriously consider outsourcing their bookkeeping operations to a service such as Quill's Pinpoint.' This statement is even more relevant now, in today's rapidly changing legal environment. Private and publicly funded practices, both new and established, all need to conform to the complexities of the Law Society's SAR and the requirements of the LSC. Added to which, partners still need to focus closely on client care, capital expenditure and staffing overheads.

Ten years ago, Quill recognised the impact proposed changes would have on small to medium-sized practices and developed a revolutionary outsourcing concept in the form of Pinpoint. Today, a decade later, almost 200 practices use Pinpoint as the core of their accounting and practice management functions, with over 40 experienced legal cashiers based in four Pinpoint offices servicing their needs.

Now, with the recent introduction of a new and radical browser-based interface, Pinpoint continues to be the most innovative solution available. Clients enjoy immediate access to their system from any Internet point, whether at the office, at court or at home. 3G and PDA technologies make Pinpoint Interactive the first truly mobile solution. There is no application to install, so access is immediate.

The introduction of the Pinpoint Promise in 2007 will clearly define the commitment to quality and meeting the needs of a changing private and publicly funded legal market place.

The appeal of Pinpoint to new start up practices is obvious. But well-established practices too, whether facing staffing issues in their accounts department or pressure from incumbent suppliers to upgrade applications, see Pinpoint as a cost-effective and viable solution.

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Fax:

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

Independent View

Select Legal Systems LAWFUSION™

A newcomer to the Guide, Select's integrated suite of legal front- and back-office software, LAWFUSION™, has seen significant advancements in recent months.

Measurable mailshots

Select's new marketing mailshot module includes a neat little application that prompts people responding to the mailshot to acknowledge its role in bringing them to the firm, a vital element of tracking marketing's success. The module can also identify opportunities for cross-selling, flagging clients who have recently instructed the conveyancing practice but who have not revised their will in the last five years, for example.

Online quoting to kick-start matters

Another recent addition to the LAWFUSION™ suite is an online quotation system, which dispenses quotes for fixed-cost legal work, generating a unique client reference number for each enquiry. When a client accepts a quote, the system automatically opens a matter, complete with all the preliminary documentation, and forwards the quote to the billing system. This will no doubt be especially popular with high street firms that want to spread their wings and trade in 'bulk' retail law over the Internet.

Telephone integration

Also useful is Select Legal's recent addition of computer-telephony integration (CTI) to the LAWFUSION™ product suite. CTI-ready phones are within the budget of most firms and, when hooked up to a PC, they can identify incoming calls from known clients and automatically open a menu, toolbar or window that lists all case or matter files related to the caller. CTI can also be configured to start a time-recording session automatically when a client calls.

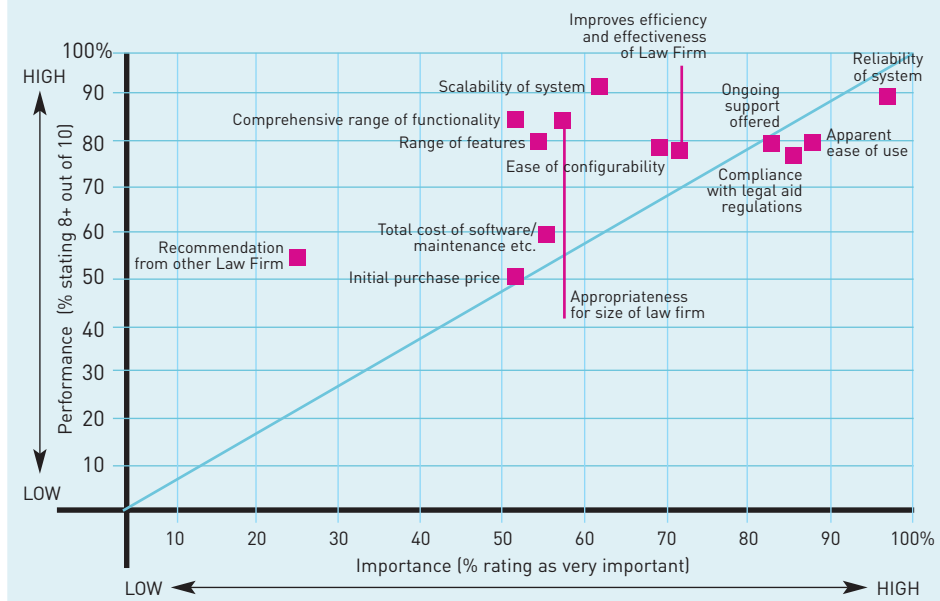
Cost-drafting system

There is innovation in the pipeline – currently being tested with a Northern firm but scheduled for commercial release next year is a 'cost-drafting and negotiation' system based on the standard LAWFUSION™ product.

Stamp duty online

Brand new is integration between LAWFUSION™ and the SDLT.co.uk online stamp duty forms service, which conveyancers will appreciate. This integration allows the two systems to work together, pre-populating the forms with relevant information held in LAWFUSION's™ database.

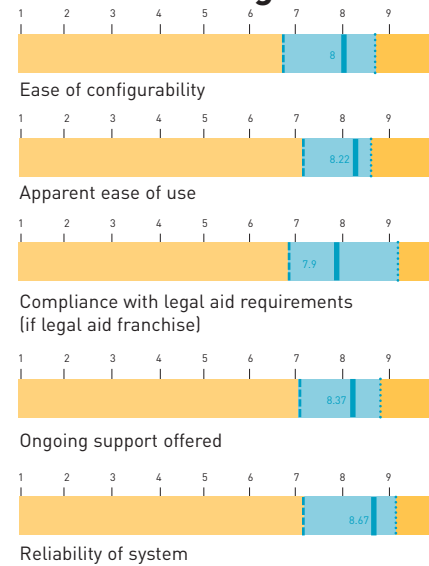
Product Performance Market research results



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.

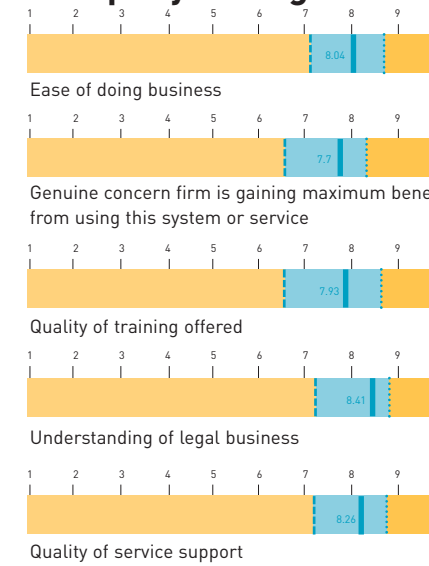
Attributes that score towards the right are perceived to be very important by the legal profession; those that score towards the left are perceived to be of much less importance. Scoring more

Product Ratings



LOWEST | THIS PRODUCT | HIGHEST

Company Ratings



Panel Analysis

In terms of purely technical impressions Select Legal gained far and away the most uses of the word 'excellent' the panel used in any of its reports. Praises went to the innovative use of wizards in the system to lead users through workflows, 'extensive' customer relationship management which links recent marketing activities if a new file is opened; 'excellent' conflict checking and anti-money laundering with online checks and flexible checks according to matter type; 'outstanding' budget variance and cash-flow forecasting; 'excellent' email handling within case management and integration with Outlook, 'excellent' financial reporting, 'excellent' extranet facilities and 'excellent' implementation of scanning with a Post Room element.

Select also seems very forward-thinking on future mobility issues, and is already designing output for mobiles, and trialling their system on Samsung Q1 ultra-mobile PCs. There were many other technically impressive elements to Select's offering. A very minor gripe is the use of Microsoft Word's version control, but this will allegedly become less of a problem in the next Office iteration. This was a very rare panel moan, however, and the overall view is best summed up with one panel member's comment that Select represents 'arguably best of the best of breed'.

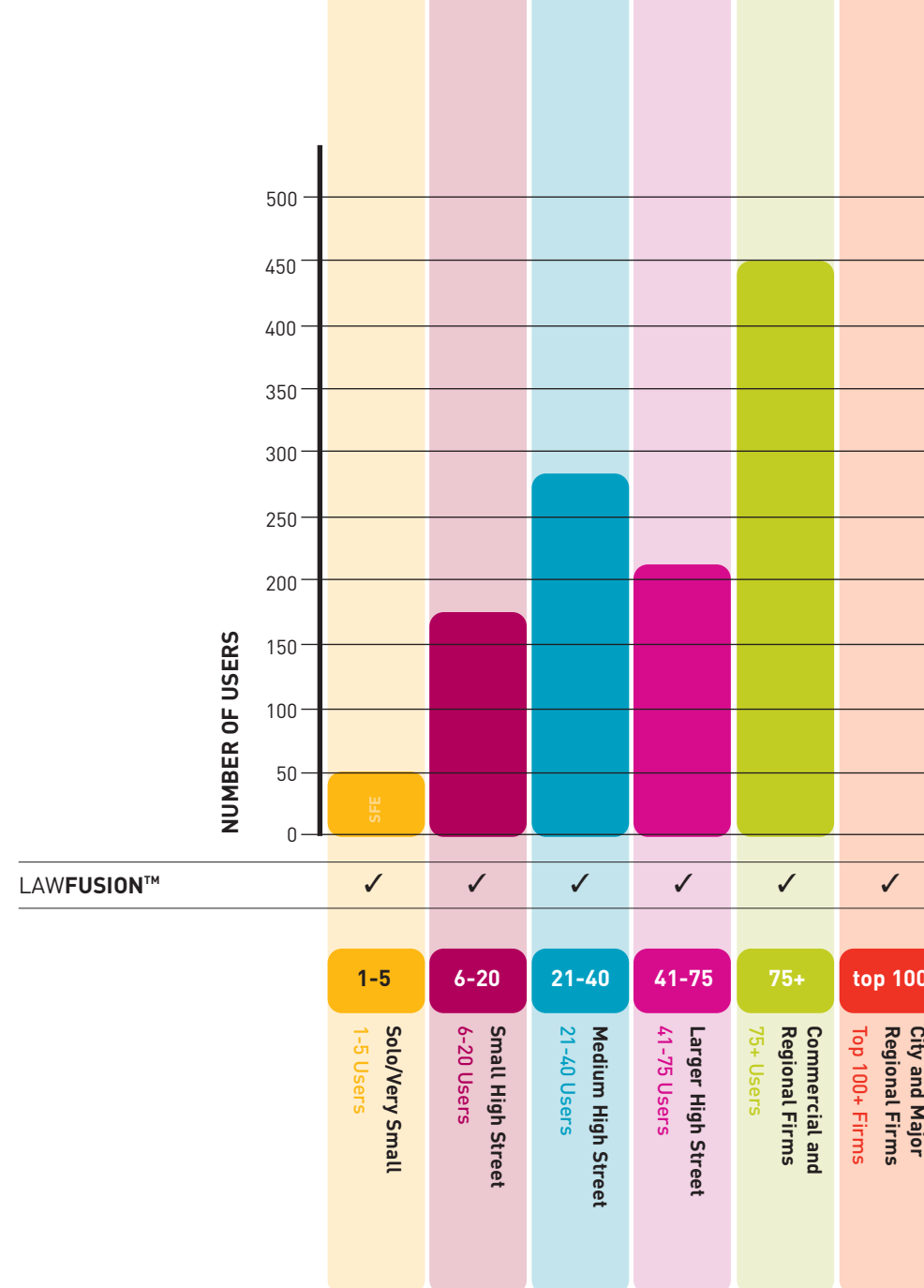
Product Pricing (Average cost per seat)

LAWFUSION™	1	5	20	40	75	
Number of Users	1	5	20	40	75	
Cost per seat (includes)	£3380*	£1486	£1094	£947	£858	
Software Installation (days)	-	1	2	4	8	
Project Management (days)	-	1	2	3	3	
Training (days)	2	3	11	15	20	
Annual Maintenance/Support Charge	£680	£900	£2480	£4560	£8140	
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 50	FIRMS	17	15	10	4	4	-
Total users 1164	USERS	51	171	284	209	449	-



LAWFUSION™	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



MIKE CRAVEN and STEVE DIXON
Directors

The Guide is the perfect platform to showcase just exactly what LAWFUSION™ has to offer and we were overwhelmed by the universally positive comments delivered by the independent panel – we couldn't have hoped for a better review on our first application in the guide.

Ultimately, we always aim to produce software that enables law firms to reduce costs, increase turnover and deliver improved services to clients and staff. We achieve this by continually developing the LAWFUSION™ software so it's very versatile and easy to use, whilst utilising innovative solutions and new technologies such as Microsoft.NET, Web Services and ultra-mobile platforms.

LAWFUSION™ is suited to all firms, from the Top 150 to the sole practitioner, catering for and delivering single office to multiple branch solutions.

Our continued policy of introducing new features and enhancements free of charge every six months is also part of our comprehensive support package. It is a service that keeps your system up to date and offers a truly complete solution. This means LAWFUSION™ offers all law firms a once-only investment instead of an open-ended cost.

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1-5

6-20

21-40

41-75

75+

Top 100

Select Legal Systems LAWFUSION™

Independent View

Solicitors Own Software SOS Connect

There has been relatively little change to SOS's core back-office system over the last twelve months. Rather, the developer's focus has been on the front-end. Matter management, powered by 'Web Services' technology, is where it's at.

Outlook interface

Unquestionably the most significant advancement is SOS's Microsoft Outlook interface for Connect. The general concept is far from unique – there are plenty of outwardly similar offerings described elsewhere in this year's guide – but SOS has harnessed the technology to good effect, delivering an intuitive and flexible suite of software tools to the fee earner's desktop. With some tweaking, the user interface can be configured as a fee earner's portal or a client's portal – and in either case, accessed remotely, over the Internet.

Workflow scripting made easy

Standard transactional and administrative legal processes are broken down into discrete elements and each is represented on a 'card'. These can be arranged and manipulated on the scripting screen, then linked with arrows to form a workflow – a simple visual aid for editing and creating standard workflows.

Case management crossover

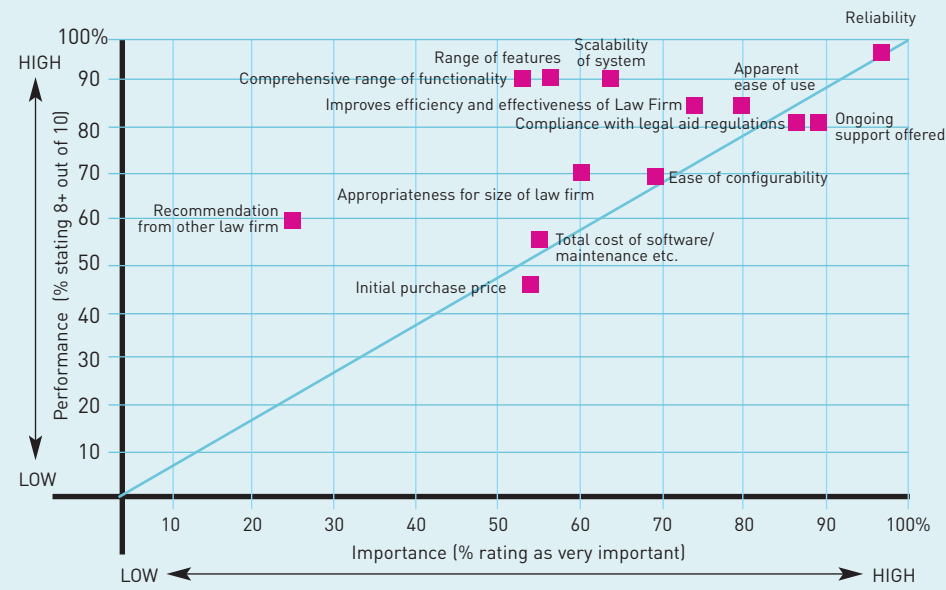
Connect can thus be used as a simple case management system, but it's never going to rival the powerful and sophisticated (and expensive) bulk-processing systems used by larger firms – and in case you're wondering, SOS's alliance with case management specialist LexisNexis Visualfiles is as strong as ever. Connect's appeal is that while it's never going to be as powerful as a full-blown case management system, neither will it require a fully staffed IT department to implement and maintain it.

And lest we forget, not everyone wants a rigidly prescriptive workflow system in their practice. Connect is probably better suited for use by qualified solicitors than by an army of paralegals. It helps get the job done efficiently, but it doesn't de-skill the workforce.

Virtual Practices

Also new from SOS is Virtual Practices, an outsourced, pay-as-you-go legal back-office service, staffed remotely by SOS's own team of cashiers.

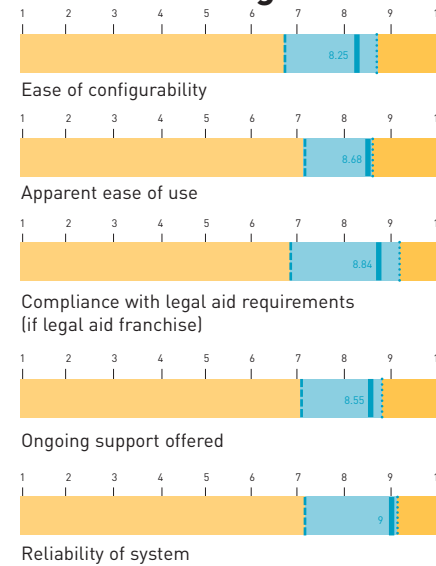
Product Performance Market research results



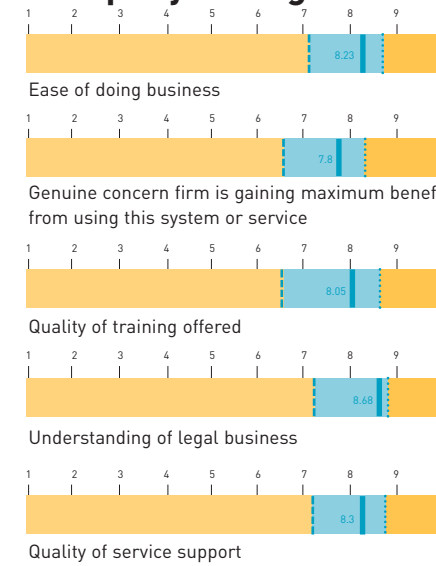
The Importance/Performance Ratio is a visual representation of each provider's performance on a range of product and company attributes in the context of what's important to the legal profession more generally.

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 Ratings



Company Ratings



LOWEST | THIS PRODUCT | HIGHEST

Panel Analysis

SOS's approach is a completely Outlook-based system that uses plenty of 'wizards', and clever use of a set of constantly present 'traffic lights' linked to matter status, a concise approach that impressed the panel. Conflicts of interest checking runs like a wizard, anti-money laundering has a 'good' warning system to the MLRO, and the traffic lights prompt if activity has not taken place, e.g. matter on hold, no file review, WIP position, near fees estimate and so on by red, green and amber warning buttons. The system also includes a flow chart-style wizard for building workflows, and the panel very much liked this visual approach to simplifying complex workflows. Some interesting visual use of business intelligence elements also cropped up, with 'reports on demand that save practice finance report writers a lot of time'.

Following the launch of Virtual Practices, SOS's case and practice management naturally follow as online possibilities. Now available for monthly rental over the Internet this makes for a good-looking system entirely outsourced and remotely served. The panel felt this showed real vision for the future of the legal profession, both in terms of business benefit and business continuity.

Product Pricing (Average cost per seat)

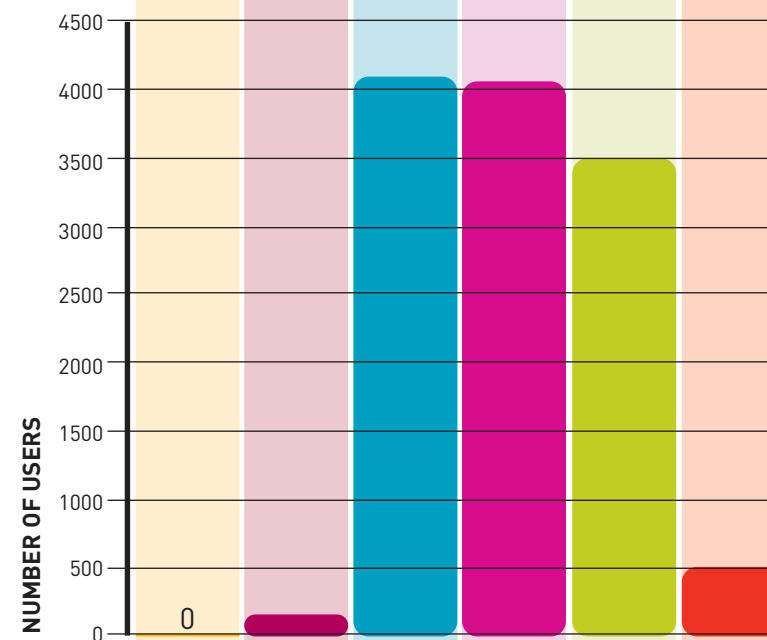
SOS CONNECT

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 425	FIRMS	0	22	217	136	44	6
Total users 12305	USERS	0	125	4100	4080	3500	500



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, our new .NET front-office, is an integrated extension of Outlook, and provides an innovative fee earner and secretarial interface to our widely installed and highly respected SOS Practice Manager back-office. The software has been specifically designed to enable staff to work anywhere – in the office, at home and even on the move.

Fully automated email and document filing, matter enquiries, and billing are supplemented by an ergonomic time logger, and customisable screens and workflows.

Using a highly visual script designer, consistent procedures may be implemented firm-wide ranging from money laundering checks to conveyancing or PI applications. Workflows can generate documents and emails, update database fields, and create tasks and appointments in Outlook. The emphasis though is on providing simple routines to assist fee earners and secretaries who know what they need to do, rather than complex applications that allow less skilled staff to process volume work. This fresh approach to legal workflow has resulted in a system which is incredibly effective, yet simple to implement and maintain.

Our new Virtual Practices for smaller firms delivers a fully managed remote legal cashier service for the back-office, along with all the matter management benefits of SOS Connect.

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1-5

6-20

21-40

41-75

75+

Top 100

Independent View

TFB plc
Partner for Windows

TFB has been busy integrating third-party applications onto its flagship product, Partner for Windows (P4W), and has launched a sophisticated suite of reporting tools.

Digital dashboard

Many practice management systems now offer a 'digital dashboard' application, which displays live financial data as graphs, pie charts and tables to illustrate 'key performance indicators' – measures of how well the practice is performing in terms of staff meeting deadlines and fulfilling billing quotas; volumes of unbilled work-in-progress, and so on. TFB's dashboard is unusual, if not unique, in that it also pulls in case management data. Some of the 30-odd reports help fee earners gauge their own performance, while others provide managers with an indication of how well their teams are achieving targets. Partners get a high-level view across the whole practice and by clicking on the graphs or charts they can 'drill down' to data on individual matters, clients or fee earners. But the best news is that it's free for existing customers, with no strings attached.

Computer-telephony integration

TFB has embedded Corebridge's CoreClick application in P4W. Now, when users highlight a contact number on their screen, the system offers to dial the number automatically. It can also recognise incoming calls from clients and offer to start a time-recording session or to open up the relevant matter files.

Automated bank reconciliation

Aurum Solutions' GroupIT application is a useful add-on to P4W, automatically matching off cashbook entries against bank statements – potentially eliminating hours of back-office drudgery.

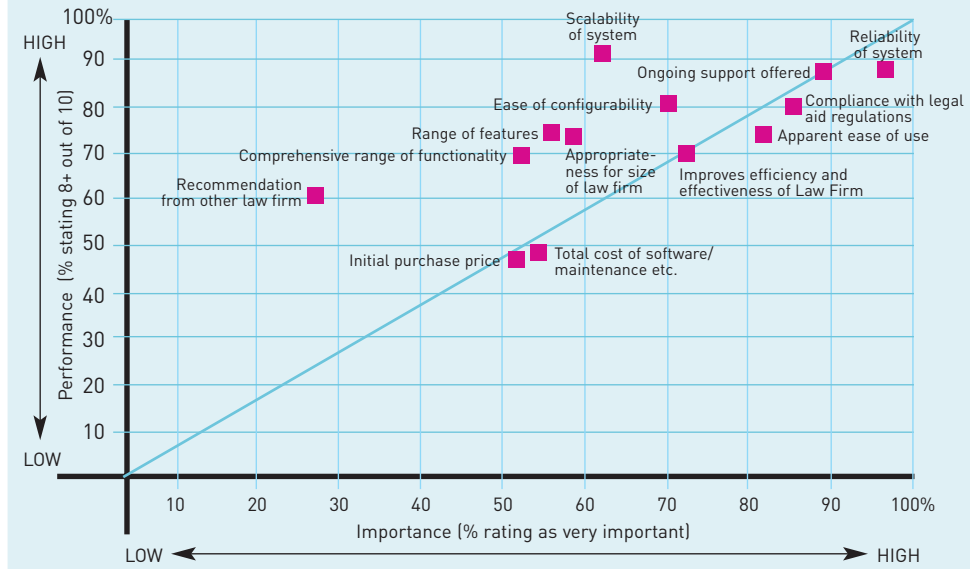
Mobile working

A joint venture with Mobotel puts all contact and matter information from P4W's case and practice management systems on the screen of a BlackBerry email device. The software is free, but you will need an airtime contract.

And finally...

Integration between P4W and Isokon Probate will be of interest to private client practices, while firms fed up with Microsoft's license fee hikes should note that an Irish firm has P4W up and running on the free alternative platform, OpenOffice.

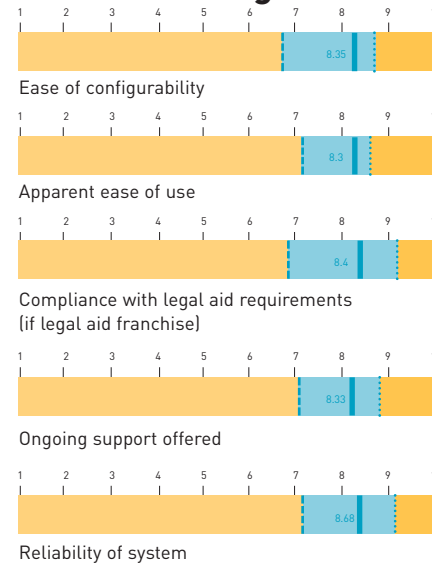
Product Performance Market research results



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.

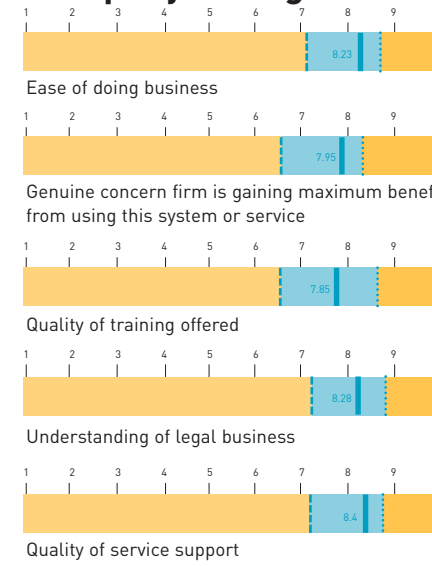
Attributes that score towards the right are perceived to be very important by the legal profession; those that score towards the left are perceived to be of much less importance. Scoring more

Product Ratings



LOWEST | THIS PRODUCT | HIGHEST

Company Ratings



Panel Analysis

TFB's 'digital dashboard' with its user-variable, graphic management display of business intelligence and management information impressed the panel – it is not the only solution of its type, but it seemed a 'very friendly way of putting business intelligence in front of the user'. Also impressive was news of TFB's ServerWatch service, the remote monitoring of customers' servers. This is, essentially, IT infrastructure outsourcing, and there are good reasons why the business world likes it. Partner for Windows also had the 'best conflict checking' some panel members saw, 'good' anti-money laundering functions (though these seem to be at a client rather than matter level), and TFB is looking to move to online ID checks.

TFB's combining of business technologies, such as linking computer-telephony integration to customer relationship processes, is 'a strong indication that law firms are beginning to understand the need for CRM at a basic level'. Partner for Windows also demonstrated the 'most sophisticated' information security elements, with the ability to create 'Chinese walls', and had a seemingly 'easily configurable' system for uploads to the Web for clients and third parties. All in all, the panel liked TFB's approach towards the future IT development of law firms.

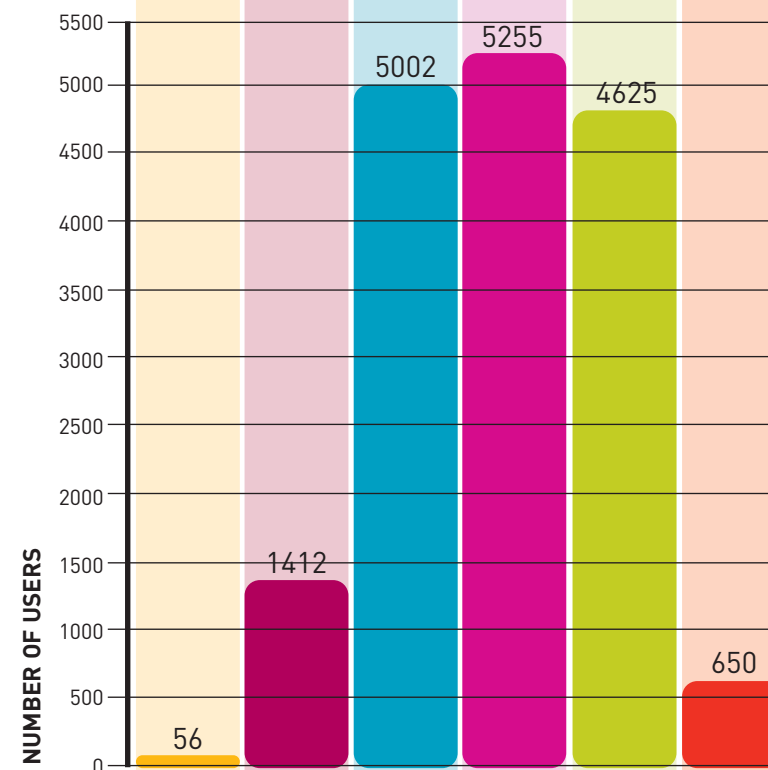
Product Pricing (Average cost per seat)

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)	0	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 419	FIRMS	25	121	149	80	42	2
Total users 17000	USERS	56	1412	5002	5255	4625	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

As a market-leading supplier TFB's name has become synonymous with the provision of the most advanced software solutions available to the legal profession. TFB's market strength is accredited to its flagship case and practice management system, Partner for Windows and the versatility of its design which can be tailored to each individual firm's requirements whether large or small. This, combined with the company's dedication to customer care and range of additional products, sets TFB apart from other suppliers and reinforces our market strength.

The Partner Program was devised during 2006 and consists of all the additional solutions that TFB offers. Such products include telephony integration (Corebridge) digital dictation (DictaNet), document archiving and storage retrieval (ZyLAB) and document comparison (Workshare). Most recently TFB has developed its own Digital Dashboard which enables appropriate members of a practice to see at a glance how the firm is performing across a range of activities and reports. Likened to the dashboard we see in cars everyday, TFB believes that the Digital Dashboard, like the other solutions in the portfolio, places the user fully in control of their system and quite literally in the driving seat.

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1-5

6-20

21-40

41-75

75+

Top 100

TFB plc PARTNER FOR WINDOWS

Product Functionality Comparison Charts

	ACCESS Practice Management	AIM Evolution	AlphaLAW Esprit	AlphaLAW Vantage	Cognito Software PracticeManager	DPS DPS Software	ECLIPSE Proclaim	JCS Legal Ledger FILDS	LPS The Partnership Suite	LINE TIME Liberate	MOUNTAIN Mountain Software Connected PMS	OPSIS Millennium Accounts	OPSIS Practice Management System	Select Legal Management System	TFB Partner for Windows	SOS Connect	LAWFUSION
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 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 Gazette every week.

Acknowledgements

Independent View

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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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