Hyperion MarketView™ Report

LEGAL MARKET INTELLIGENCE

Mitratech - TeamConnect

AS FEATURED IN THE
HYPERION MARKETVIEW™ RESEARCH PROGRAM

Enterprise Legal Management: E-Billing and Matter Management Systems for Corporations

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HYPERION GP RESEARCH

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COMPLIMENTS OF
MITRATECH

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Introduction

Welcome to the 2014 Edition of the *Enterprise Legal Management: E-Billing and Matter Management Systems* report. Incorporating over 300 hours of industry benchmarking, primary interviews, client references and vendor briefings, the report provides an invaluable resource for General Counsel and Legal Operations Managers to understand the leading trends in corporate legal department management, and the software solutions landscape. This Hyperion MarketView™ Report is particularly oriented towards the solution needs of mid-to large-sized legal departments (i.e., Global 1000 organizations) that are seeking integrated solutions that include advanced capabilities in spend management, collaboration, workflow and advanced analytics. Other MarketView™ reports may be more appropriate for small- to mid-sized organizations.

As we did for 2013, this report offers a global perspective on e-billing and matter management. In addition to our historical focus on U.S.-based solution requirements, we have extended our market assessment to include international regulatory compliance for electronic invoicing including Value Added Tax (VAT).

The focus of this MarketView™ Report includes:

- Solutions capable of global law department support
- Solutions oriented towards the needs of mid-to-large-sized law departments
- Integrated solutions that address the needs of Enterprise Legal Management
- Solutions with workflow and advanced automation capabilities
- Solutions specifically designed to support a collaborative ELM process
- Advanced reporting and analytics
- Solutions built on current technologies, particularly in terms of scalability and security

Comprised of over 110 pages, the report provides:

- Trends in the solution market
- Key solution components we expect from leading solutions in our evaluations
- Identification of vendors in the solution area
- Review and assessment of advanced vendors
- Guiding principles for selecting and implementing solutions

Our Research Process and Evaluation Methodology

Our research process uses a structured approach that includes both primary and secondary sources. We use publicly available information, as well as proprietary research developed through our work with corporate law departments, law firms, software vendors and industry thought leaders. These resources are used to both develop our perspectives on the market and to evaluate vendors.

Our market research starts with a comprehensive market survey to identify all vendors in the solution area. The initial vendor pool is constructed from market research, including our vendor database, Internet-based research, industry trade surveys, our own market experience and our clients. All identified vendors are initially screened for inclusion based on their fit to our project objectives.

Based on our initial screening, vendors then are assigned to either the *Market Participant* group or the *Advanced Solution* group according to the following criteria:

- A ***Market Participant*** vendor provides capabilities in the solution area, with a focus on specific aspects of the solution or that serve a sub-section of the market; the vendor may be a relatively new entry to the market or have not yet established a significant market position relative to the solution capabilities expected.
- An ***Advanced Solution*** vendor demonstrates significant strength in both product functionality and overall solution capabilities; meets or exceeds all Key Solution Components; has a strong record of client satisfaction and market share; provides a consistent flow of valuable enhancements; has a highly regarded management team and organization; and has demonstrated financial stability.

For each advanced vendor, we engage in a more in-depth and detailed evaluation using our proprietary methodology – the **VendorView™ Evaluation**. We collect information both directly from the vendor and from secondary sources. This includes publicly available marketing materials, presentations and other information. We also offer vendors an opportunity to directly provide us information about their company, products and services through our Vendor Briefing Process. Vendors submit answers to a written questionnaire and provide our analysts with a live presentation including product demonstrations. We independently verify and corroborate vendor information wherever possible.

Customer reference calls are an important part of our process. We interview reference clients to gain perspective on use of the system and experience in working with the vendor, including the ability to meet requirements, project complexity, vendor responsiveness to support issues and other perceived strengths. In addition, we discuss with the references why they selected a vendor over other options during their competitive selection processes.

With regard to confidential information, while we may receive or be privy to confidential or proprietary information about vendors or their clients, we do not include or otherwise disclose such information in our MarketView™ or briefings.

To maintain objectivity, vendors do not directly contribute or have review rights to their evaluation or the evaluations of their peers.

Based on our collected information, we rate each vendor. Our rating considers both the capabilities of the products and of the vendors themselves in eight (8) key areas, using a 10-point scale in each category.

VENDORVIEW™ EVALUATION

RATING CATEGORY	CRITERIA
PRODUCT FEATURES	▪ Support for Key Solution Components ▪ Perceived quality and refinement of features ▪ Differentiated feature(s)
PRODUCT USABILITY	▪ The "look and feel" and adherence to common UI design ▪ Efficiency of navigation
PRODUCT MATURITY	▪ Maturity and completeness of features ▪ Stability and robustness of application ▪ Enhancement roadmap and history
TECHNOLOGY	▪ Technology platform standards ▪ Flexibility ▪ Robustness, scalability ▪ Development methodology
IMPLEMENTATION	▪ Implementation approach and credentials ▪ Implementation costs ▪ Hosting infrastructure (technology, security, process)
MAINTENANCE AND SUPPORT	▪ Maintenance approach ▪ Maintenance costs
COMPANY VISIBILITY	▪ Market position / size ▪ Business model ▪ Organization size ▪ Financial position
MARKET VISION	▪ Demonstrated thought leadership ▪ Industry participation ▪ Competitive differentiation

We base the product-related aspects of our VendorView™ evaluation on a standard set of features and capabilities identified as Key Solution Components ("KSCs"). We develop our KSCs based on a set of use cases, and on best practice features and capabilities expected from leading software products. The KSCs provide a consistent set of functional criteria by which we evaluate and compare vendors. The KSCs also provide a starting point for clients to develop their own requirements and selection criteria.

The VendorView™ evaluation also provides our perspectives and opinions about each Advanced Solution vendor in the marketplace. This includes our views on the important points of consideration that clients should explore in evaluating a vendor. Strengths or cautions are not necessarily considered positive or negative, but may represent areas where companies would be advised to explore and understand the vendor's capabilities and fit.

To assist our clients understand areas we consider of particular interest for a vendor, we may identify certain notable capabilities or features as *Market Leader* or *Highly Innovative*:

The ***Market Leader*** designation recognizes capabilities that are particularly differentiated in the market, and that clients have reported surpass expectations in delivering a high value solution. The Market Leader designation applies to truly superior features that are well established and proven, and which are considered "game changers" in the value of the solution.

The ***Highly Innovative*** designation recognizes capabilities that are significantly novel in the solutions market. A Highly Innovative feature is one of a kind in its design, approach and/or utility; often it has been recently introduced to the market and is likely to be followed by competitors. A Highly Innovative feature may be specialized in a narrow or specific use, or may be a broad approach that spans the solution (e.g., user interface design).

Finally, for each vendor evaluation, our findings and opinions are based on market expectations and the vendor's relative capabilities in the overall peer group of solutions being evaluated. Importantly, our evaluation looks at general, cross-industry capabilities, as well as giving special consideration to a solution's specific capabilities in the legal industry. Clients should consider their own particular needs and requirements when evaluating their solution options, whether a given vendor is identified as a Market Participant or an Advanced Solution. Also, some vendors may be covered in other research segments and reports, and their evaluations may be significantly different in those contexts.

The Vendor Landscape for E-Billing and Matter Management Systems

The e-billing and matter management market is well populated with a broad mix of vendors. We continuously monitor the market for new and emerging solutions. Over the course of our research, we have identified well over 30 solutions with some relevance to corporate law department management. These include solutions in related or accessory areas that may not provide the broader, enterprise capabilities defined in this project. Vendors not included in this report may be covered in other Hyperion Research segments.

For purposes of the objectives of this MarketView™ report, we focused our analysis on 21 products. Of these, 12 were considered to meet a limited set of the Key Solution Component criteria. These products and vendors are identified as Market Participants, and listed below with a short description. While not covered in depth here, we may cover a Market Participant vendor in our other research projects.

The remaining nine (9) products met our project definition and the KSC criteria to a higher degree, and were further reviewed as Advanced Solution vendors using our VendorView™ *Evaluation* process.

Market Participant Vendors

Market Participant products met our project definition and are considered to provide basic capabilities in our Key Solution Components. These vendors may be considered viable solutions for special or niche applications.

The following vendors have been identified as Market Participants:

COMPANY	PRODUCT	DESCRIPTION
ADVOLOGIX	**AdvologixPM**	Introduced in 2011, Advologix's Practice Management solution is an Sforce.com based solution that provides a full complement of modules for both law firms and law departments. These include billing and matter management, as well as calendaring, contacts, and document management. As a multi-tenant, SaaS-based solution, it offers ease of deployment and cost advantages. www.advologix.com/web/
ACUITY MANAGEMENT SOLUTIONS	**Acuity Content Management**	Formerly TrialNet, Inc., Acuity (June 2010), provides a suite of web-based tools which assist corporate legal and insurance claims departments with cost containment. Modules include Electronic Billing; Matter Management; Collaborative Databases for Experts/ Mediators/ Opposing Counsel; and a bulk-invoicing tool designed especially for mass-tort defendants. www.acuitymanagement.com
BOTTOMLINE TECHNOLOGIES	**Legal eXchange**	Bottomline is a publicly-traded company, providing electronic payment, invoice and document management solutions. Legal eXchange is a software-as-a-service (SaaS) offering used to receive, manage and control invoices, payment processes and

COMPANY	PRODUCT	DESCRIPTION
		the related spend management, with a specialty for insurance companies and other large consumers of outside legal services. www.bottomline.com
COMPUTER SCIENCES CORPORATION (CSC)	**Legal Solution Suite**	CSC is a publicly traded technology services and software company. The Legal Solution Suite provides modules to support litigation management and legal cost solutions, including case management and collaborative bill review software, outsourcing and consulting services. CSC is particularly focused on providing solution to the insurance industry. http://www.csc.com/legal_solutions/
CORPORATION SERVICE COMPANY	**E-Billing; Matter Management**	Founded in 1899, Corporation Services provides corporate identity, governance and compliance services. Its legal matter and deal management solutions area includes software and outsourced services for legal invoicing and matter management. www.cscglobal.com
CORPORATE LEGAL SOLUTIONS	**Case & Point**	Founded in 1988, Corporate Legal Solutions serves small- to medium-size corporate law departments, with a focus on general matter management. Case & Point is a client-server based application, with proprietary remote access capabilities. Case & Point is offered with a set of standard modules, and optional modules for e-billing and other functions. http://www.corplegalsolutions.com/
ECONOMIC ANALYSIS GROUP, LTD.	**CaseTrack**	EAG has 20 years of legal market experience. The CaseTrack solution is a small to medium-sized law department solution, offering credible functionality for e-billing and matter management, with additional modules for legal hold, time keeping and general document management. www.case-track.com
LAW DEPARTMENT DESKTOP SERVICES, LLC	**Law Department Desktop Services (LDDS)**	Law Department Desktop Services (LDDS) is a Microsoft Sharepoint (2010) based system focused on managing attorney work product and collaboration between in-house counsel and outside counsel. The system provides an off-the-shelf, pre-configured SharePoint template that allows departments to deploy quickly with minimal setup. The system is offered primarily as a hosted, SaaS-based solution, although can be deployed in-house if required. www.lawdepartmentdesktop.com
LECORPIO, INC.	**Legal Resource Manager (LRM)**	Legal Resource Manager (LRM) is an integrated Microsoft .NET based system best known for its intellectual property management, but that also provides comprehensive modules for e-billing, matter management, contract management, and entity management. Lecorpio is not currently active in the general corporate legal market, but offers an interesting alternative. LRM can either be deployed in-house or externally hosted. www.lecorpio.com

COMPANY	PRODUCT	DESCRIPTION
LEGAL FILES SOFTWARE, INC.	**Legal Files**	Legal Files provides general legal case and matter management software, primarily for small organizations and law firms. Legal files is offered as either a client-server or web-based application. www.legalfiles.com
LEGAL SOLUTION GROUP	**Advocator System**	Legal Solutions Group is a leading provider of case and claim management solutions to the insurance industry. The Advocator System provides technology for managing the full lifecycle of claims and litigation. LSG also provides comprehensive claim administration and spend management services. www.lsg.com
THOMSON REUTERS	**Elite Prolaw – Corporations**	ThomsonReuters Legal Solution unit is a leader in comprehensive products and services to the legal industry. The Elite product line is primarily focused on the law firm market, providing a full suite of front-office and back-office solutions. The Prolaw-Corporations product provides basic e-billing and matter-management capabilities. www.elite.com

Advanced Solution Vendors

Of the 21 products included in this MarketView™, we determine nine (9) of those products to be Advanced Solutions. Each of these Advanced Solutions provided all or substantially all of our Key Solution Components. The Advanced Solutions are each considered highly credible solutions for integrated enterprise legal management. We encourage clients to consider their specific needs and requirements when planning their vendor evaluation process.

That said, the following vendors are our Advanced Solutions in the area of E-Billing and Matter Management Systems for 2014 (listed alphabetically):

COMPANY	PRODUCT	WEBSITE
BRIDGEWAY SOFTWARE	**eCounsel™**	Bridgeway's flagship ELM product features a robust set of matter-management tools and compatibility with the company's Corridor e-billing system. Bridgeway E-Mail Link 2.0 and other powerful integration tools help make eCounsel™ easy to deploy and use.
BRIDGEWAY SOFTWARE	**Law Manager**	Law Manager is an especially powerful tool for extremely large corporations and government agencies with complex data regimes to manage. The system's "notebook" template designs make the product highly configurable and flexible.
DATACERT, INC.	**Passport®**	A leader in the offering of ELM-related international spend-management and governance, risk and compliance (GRC) tools, DataCert has recently merged with TyMetrix, another Advanced Solution provider in the ELM space.

COMPANY	PRODUCT	WEBSITE
DOELEGAL	**Ascent™**	doeLegal's ELM product offers a full range of matter-management and e-billing functionality, including international VAT compliance and real-time reporting of data. A "predictable cost of ownership" monthly subscription model also differentiates ASCENT™.
LEXISNEXIS®	**CounselLink®**	Its origins lie in e-billing, and its spend management tools are among the most powerful in the market, but CounselLink® has also aggressively developed its matter-management offerings over the past couple of years. A recent move of operations to Raleigh, NC, promises a continued focus on product development.
MITRATECH, INC.	**TeamConnect**	Mitratech released TeamConnect 4.0 this summer, giving end users of one of the most configurable ELM tools available to large, highly regulated law departments even more control over the look, feel and reach of the system.
MITRATECH, INC.	**Lawtrac**	Lawtrac is designed specifically to address the needs of small-to-midsized law departments, offering a broad array of "out-of-the-box" tools and reports to get an ELM operation up and running quickly. Mitratech bought Lawtrac early in 2014 and is investing heavily in the system's UI features and user-friendliness.
SERENGETI, A THOMSON RUETERS BUSINESS	**Serengeti Tracker**	Long a staple of small-to-mid-sized law departments, Serengeti is now competing for larger, enterprise-level clients and is also actively extending its e-billing and spend management product roadmap to reach globally . The product will be offered as part of owner Thomson Reuters' planned Concourse bundle of practice-management and legal-research tools.
TYMETRIX	**TyMetrix 360°**	TyMetrix 360° is a powerful, SaaS-based ELM system with broad matter-management and e-billing functionality, and a particular focus on the provision of legal intelligence and analytics tools. The company recently merged with DataCert, another Advanced Solution provider in the ELM space.

MITRATECH, INC. – TEAMCONNECT

Founded in 1987, Mitratech was an early player in the market for legal automation solutions. Today, Mitratech's ELM software products provide platforms for the critical operations of legal departments of all sizes and industries domestically and internationally. The company's flagship product is TeamConnect. TeamConnect 4.0, released just this past summer, offers a high level of functionality, while ensuring that the product can be implemented, administered, configured and upgraded in an efficient and sustainable manner. The system can be supported primarily with business-analyst and light-technology resources. All design, configuration, and testing development work is handled through a comprehensive set of tools that are accessed through user interfaces (as opposed to more technical development tools). TeamConnect is geared toward law departments in organizations with more than $5 billion in revenue, and has the product team has industry expertise in insurance, energy and utilities, technology, financial services and automotive manufacturing. (For confidentiality reasons, Mitratech would not publicly divulge specific TeamConnect clients.)

Company Background

AREA	DESCRIPTION
COMPANY NAME	Mitratech Holdings, Inc. (Mitratech)
ADDRESS / PHONE / WEBSITE	5001 Plaza on the Lake, Suite 111, Austin, TX 78746 +1 512 382 7322 www.mitratech.com
OFFICE LOCATIONS – Indicate HQ And Other(S)	Austin, Texas (HQ) London, UK
PRODUCT DEVELOPMENT LOCATION(S) – Indicate Primary And Other(S)	Austin, Texas
NO. OF EMPLOYEES – Total Software Business	166
NO. OF EMPLOYEES – Software Development	48
NO. OF EMPLOYEES – Customer Support	25
NO. OF EMPLOYEES – Implementation / Consulting Services	27
NO. OF SOFTWARE CLIENTS - Total	220+ corporate legal clients, 100 percent of AmLAW 200 using e-Billing products

Product and Technology Background

AREA	DESCRIPTION
PRODUCT NAME- VERSION	**TeamConnect 4.0 - June 2014** ▪ Enhanced searching and editing

AREA	DESCRIPTION
	▪ Enhanced workflow designer ▪ Support for SAML 2.0 for Single Sign-On ▪ Enhanced screen designer ▪ Enhanced budgeting tool with high configurability ▪ New holistic and standards-based API ▪ Smoother upgrades with upgrade toolkit
RELEASE HISTORY	**TeamConnect 3.4 – April 2013** ▪ TeamConnect Deadlines - automated court rules & deadlines calculator powered by CompuLaw ▪ Accounts Payable Link – interface with most major accounts payable systems ▪ Enhancements to spend management - LEDES support, timekeeper rate collaboration, AFA support, budget sharing ▪ Email notification template designer ▪ Enhanced rules engine **TeamConnect 3.4SP1 – October 2013** ▪ Usability - Enhanced invoice review screens ▪ International Tax Support – line item level tax for VAT and other non-US taxes ▪ Appeals invoicing
NEXT PLANNED RELEASE	**TeamConnect new version (likely dubbed 4.1)** ▪ Reimagined native reporting and dashboards ▪ Reengineered search capabilities ▪ Enhanced Office Suite module **TeamConnect new version - 2015** ▪ Enhanced collaboration-focused portal for outside access, including rapid app/workflow tools ▪ Complete redesign of user interface - for both usability/navigation and aesthetics ▪ Enhanced contracts management product offering ▪ Internationally focused enhancements ▪ Updated Legal GRC product (likely 2015)
PRODUCT DEVELOPMENT APPROACH	The product roadmap is determined based on direct customer input and feedback, as well as market research and participation in industry associations. Mitratech offers client advisory boards, regional user groups and user conferences, roadmap surveys, beta client demos and online feedback gathering tools. Mitratech's product roadmap focuses on release priorities 6-to-18-months out, although the company re-evaluates monthly and can adapt to changing market needs quickly.

AREA	DESCRIPTION
MODULES AND CORE FUNCTIONS	**<u>Matter Management</u>** ▪ Supports all legal matter types including disputes and litigation, contracts and transactions, intellectual property, or claims ▪ Standard and client defined configurations for legal disputes, transactions and advice & counsel ▪ Global search and navigation across matters ▪ Data entry wizards ▪ Automation to assign matters and generate notifications and reminders according to specific workflows ▪ Integration with Outlook, Lotus Notes and Microsoft Office Suite (including Word, Excel, and PowerPoint) Configurability and security settings ▪ Clients use preconfigured screens or can use a configurable screen designer to design custom screens, views, and fields at any time. Administrators can control visibility on a per-record and per-user basis ▪ Fully configurable fields ▪ Ability to add custom fields to capture information important to the individual legal department ▪ Native ad hoc or scheduled reports. Clients can get a single view of all matter information, documents, and spend data through TeamConnect's native reporting engine ▪ Configurable home pages can be customized to show each team member role- and project-relevant data ▪ Clients can also integrate with 3rd party reporting engines, including Business Objects, Cognos, Tableau and Microstrategy ▪ Reports and dashboards can be shared with appropriate users based on permissions Broad interoperability ▪ Clients can automatically move information into TeamConnect from claims management, compliance, accounts payable, service of process, human resources and other business systems to minimize the errors inherent in manual matter entry **<u>E-Billing</u>** ▪ Ability for law firms to self-supply timekeeper profile and rate information, allowing legal staff to make selections and approve rates rather than spending time researching and entering vendor data ▪ Automatic translation of any manual and LEDES format used by law firms into a single complete invoice form; formats

AREA	DESCRIPTION
	include LEDES 2000 and XML 2.0 and 2.1 on top of LEDES 98 and 98BI ▪ Ability to handle multiple currencies easily, including line-item level taxes for international VAT handling ▪ Automatic invoice checking and adjustment against approved rates. Automatic notification to staff of billing discrepancies and approval requests based on firm, matter, milestone, or invoice amount ▪ Automatic notification to staff of billing discrepancies and approval requests based on firm, matter, milestone, or invoice amount. ▪ Approval of invoices on-the-go with the TeamConnect mobile application ▪ Audit trail of all modifications including approvals, reviews, adjustments and rejections ▪ Two-way integration with all leading AP systems, with automatic firm notification and recording of payment status **Financial/Spend Management** ▪ Creation of budgets automatically upon matter creation, saving staff time and ensuring that all data is included. TeamConnect's comprehensive budgeting capabilities allow individual clients to use multiple budget methodologies, non-standard fiscal years, enhanced accruals, and budgeting down to the phase and task level ▪ Requirement for firms to set up and update budgets before beginning work, then collaborate on budgets through a secure e-billing portal ▪ Tracking and reporting on matter budgets by time period or matter phase, tracking accruals and actuals and sending milestone notifications ▪ Centrally stored firm profiles that support selection based on matter type, involved parties, conflict checking, and rates ▪ Pre-configured alternative fee arrangements (AFA) module that reduces outside counsel spend while making firms more efficient ▪ Invoices are automatically held in compliance with negotiations, while savings are tracked and reported to improve results ▪ Assessment over time that allows staff attorneys to optimize firm and timekeeper selection; by selecting firms that represent the best value based on past results and costs, legal departments further reduce legal spend and improve outcomes

Document Management

TeamConnect Document Management includes:

- The ability to centrally track locally and remotely stored files, matter/case information
- Out-of-the-box capability to associate documents with individual matters or matter types (litigation vs contracts as an example)
- Security adherence fully extends to document management. In other words, users only see documents for matters that they are given permission to view
- Full-text searching
- Version control with a complete audit trail
- Drag-and-drop interface to Outlook or Lotus Notes
- Ability to integrate with Microsoft Office using TeamConnect Office Suite
- Support for document types including audio/video
- The ability to store user-defined templates for standard forms, letters and reports
- Flexibility of customization by users through the inclusion/deletion of data elements
- The ability to mail-merge names and addresses into standard forms, letters and notices
- The ability to easily package various documents related to a matter or invoice

Business process management

The core platform, TeamConnect Enterprise, operates as the business process management solution for legal and compliance departments. Business rules and workflow engines allows the configuration of the system to best fit specific business needs and requirements. TeamConnect's native business process management offers:

- Comprehensive architecture that provides a proven foundation from which to develop best practices against specific work flows and business processes; virtually any workflow can be designed within TeamConnect
- The flexibility to change workflow at any time without disturbing production to deal with new challenges and capitalize on new opportunities
- Comprehensive, native rules engine that allows automatic assignment of matters to users and groups
- Ability to generate tasks, email notifications, and reminders according to self-configured workflows and rules

AREA	DESCRIPTION
	▪ Ability to open new matters using data entry wizards, or integrate with third-party solutions such as **Service of Process.** ▪ The ability to check in and check out documents and retain version control within the native document management system ▪ Validation and notifications around the business process to ensure consistency throughout the matter lifecycle ▪ The ability to connect various parts of the organization as well as outside counsel within the TeamConnect solution. ▪ Establishment integrations to a wide array of systems within the enterprise; TeamConnect's interoperability empowers it to act as a central repository of information by integrating any third-party system through the Web services layer **Additional Applications** With **TeamConnect's Legal Hold,** users can: ▪ Identify matters requiring legal hold early in the matter lifecycle, reducing risk to the organization ▪ Select custodians using integration with an HR database. Users may also add nonemployee custodians ▪ Get visibility throughout the legal hold lifecycle and quickly pull documentation needed for court appearances, with powerful out-of-the-box reporting ▪ Send email notices to custodians and non-TeamConnect users, directing them to a secure site where they can attest to compliance and understanding of holds. TeamConnect Legal Hold also allows mobile access to recipient responses ▪ Get real-time tracking agreement and compliance ▪ Store matter management and legal hold information in one central location **TeamConnect's GRC** provides a broad range of legal governance, risk management, and compliance applications Over 15 percent of TeamConnect clients utilize TeamConnect for GRC purposes. **TeamConnect Entity Management** makes complying with filing requirements across all jurisdictions easy by adding automation to the regulatory workflow. Validations and pre-defined controls ensure that records are accurate, complete and compliant with the client's corporate governance best practices. **TeamConnect Deadlines**, TeamConnect's automated calendaring feature helps legal departments reduce staff time and lessen risk. Integration with Aderant's CompuLaw, the most complete available

AREA	DESCRIPTION
	database of jurisdictional court rules, gives corporate legal departments access to the technology used by 70 percent of ALM 100 law firms. Once a matter is registered and a jurisdiction and trigger date selected, TeamConnect calculates all associated deadlines. Tasks, appointments, and updates are automatically pushed to all associated attorney calendars and updated regularly – protecting against missed dates and costly errors. **TeamConnect's Contract Management** solution offers support for redlining, versioning, approval workflows, expiration notification and contract/document generation. Configurable wizards create a consistent format for contracts and documents. Each contract is fully integrated into the legal management system, streamlining workflow between legal and other business units. Microsoft Office suite integration allows attorneys to work on contracts in MS Word, and then tie them into matter and document management solutions. The result: version control and an auditable trail of all changes. Fully searchable clause libraries make it easy to reuse proven language and avoid duplicating effort.
DESCRIBE TECHNOLOGY "STACK"	Java technology stack ▪ Java EE framework (MVC) ▪ Support for WebLogic 10/11, WebSphere 7, Tomcat 6, JBOSS 5 ▪ Oracle 10/11; SQL Server 2005/2008; ▪ IE 8+, Firefox 3.6+, Safari 5+, Chrome 12+
SYSTEM LOCATION	▪ Options include: Dedicated application, installed on-premises ▪ Dedicated application, hosted (third-party, tier 1 hosting partner)Full SaaS single-tenant, separate schema application
INTERFACES	Provides defined APIs for Single Sign-on, DMS, financial systems, enterprise email and reporting / analytics. Also provides toolkit for client specific interface requirements. Interfaces can be designed as Web services.
SECURITY MODEL AND ARCHITECTURE	▪ Support for https access (SSL v3/TLS v1) ▪ Authentication plug-in API to integrate with industry standard Single Sign-on authentication schemes like Windows Integrated Authentication (Kerberos/NTLM), Netegrity's SiteMinder, Tivoli Access Manager, etc. ▪ Passwords encrypted in one way cryptographically secure hashing algorithm (SHA-1) ▪ Multi-level fine grained role-based access control (RBAC) to limit access to modules, records, categories of records and certain fields of records

AREA	DESCRIPTION
	▪ IBM's Rational AppScan used to find and eliminate high priority Web security vulnerabilities like SQL Injection and Cross-site Scripting ▪ Support for database encryption
CERTIFICATIONS OR OTHER ACCREDITATION	**TeamConnect** ▪ Oracle Silver level partner ▪ TSIA (Technology Services Industry Association) Level II ▪ Safe Harbor ▪ SAS 70 Type II

License Model and Implementation Services

AREA	DESCRIPTION
LICENSE MODEL	Included below are the standard deployment options: ▪ **On-premises delivery:** This option is designed for organizations with dedicated IT resources able to support software implementation, maintenance and upgrades, and who demand full application control through a physical installation. The software is installed within the client's environment, behind their corporate firewall. A majority of TeamConnect clients have on-premises delivery. ▪ **Hosted:** This option is ideal for enterprises with limited IT support but who still need comprehensive control over their applications, and wish to have the day-to-day administration addressed by a third party.
LICENSE CALCULATION	The pricing model is built upon a number of factors: user count, user type (limited vs. full), modules purchased, length of term, activity through the e-billing portal, number of matters and other consumption-oriented factors related to use.
CHARGES TO LAW FIRMS/OTHER VENDORS	TeamConnect does not currently directly charge the law firms for access to submit invoices and budgets, provide information on their timekeepers, and collaborate on matters.
MAINTENANCE FEES	Maintenance fees are included in all subscriptions. Annual maintenance is sold for Perpetual On-Premises Software. The Maintenance & Support Program includes professional technical assistance with a 24-hour response mandate for all clients and a 2-hour response mandate (during business hours) for urgent issues.
ASP OR HOSTING – Costs And Options	Hosting costs are based on the clients' specific needs. Mitratech can host clients on dedicated or shared hardware.
CUSTOMER SUPPORT – Costs And Options	Customer support is included in the Maintenance fee and SaaS fees. It includes up to 24-7 technical support, with a tiered offering to allow clients to choose the level of support their implementation requires.

AREA	DESCRIPTION
	▪ **Standard Support -** Mitratech offers standard support from 7 a.m.-7 p.m. CST. Primary support is based at Mitratech's headquarters in Austin, TX. There are dedicated support teams for TeamConnect for outside vendors for that utilize e-billing. There is a 24-hour response mandate for all clients across the organization. Mitratech also upholds a 2-hour response mandate (during business hours) for more pressing issues. All support plans include free platform releases, email support and phone support. Multilingual support is also included. ▪ **Enhanced services -** Enhanced services are available with Premium and Ultimate support plans. These programs include 24-7 phone and email support, monthly status reports, on-site support, dedicated technical support representative. ▪ **Client Web portal –** Mitratech provides self-service through an online client Web portal. This tool streamlines support to easily create and track support cases. It also provides access to a knowledge base containing support articles and links to past client "tips and tricks" Webinars. In addition, clients are able to influence future versions of TeamConnect and submit ideas to be considered for future product releases.
IMPLEMENTATION SERVICES	Implementation costs use a "Time & Materials model" and are derived from client requirements. The company also works with a client's IT resources and/or third party implementation consultants. Full-service law firm implementation included in annual subscription for e-billing.
USER TRAINING	Mitratech offers a host of training options. Instructors are available for on-site client training courses and regional training courses. In addition, Mitratech offers a self-paced online training course.

VendorView™ Evaluation

With the release of TeamConnect 4.0, Mitratech continues the emphasis on empowering its large, enterprise level clients (generally featuring $5 billion in revenue or more) with increased configurability, flexibility and usability. TeamConnect 4.0 significantly expands the number of available matter-based templates, dropdown capabilities, configuration tools, out-of-the-box API layers and design "wizards" available to clients than were offered in previous iterations.

The added end-user horsepower follows other recent matter-management enhancements such as an interface to Compulaw for court rules and deadlines that provides an automated docket management capability. Additionally, while the majority of TeamConnect's user base is built upon on-premises installations, the percentage of new clients opting for a hosted, SaaS-based solution is on the rise. This infusion of user-friendliness, combined with Mitratech's longstanding ability to develop custom applications and interfaces for law-department matter management, should only enhance TeamConnect's reputation as a platform-based solution. Indeed, among TeamConnect clients we spoke to, who work in regulated industries such as oil and gas and insurance, TeamConnect received high marks for that flexibility, as well as for features such as its built-in document-management tool and for an ability to assimilate existing, complex data regimes comfortably during implementation. Configurability and competence, then, were cited as differentiators.

TeamConnect has primarily been a matter-management player during its lifetime, and its e-billing development and marketing has lagged somewhat as a result—the majority of revenue still is generated on the matter management side. However, a robust feature set to enable a complete e-billing workflow, including the ability to pre-audit invoices before submission, does exist in TeamConnect. The company expects to double its e-billing revenue this year and for aggressive improvement growth on the e-billing side to continue.

For international clients, TeamConnect provides basic currency and financial controls capabilities. Support for LEDES standards, including XML 2.0/2.1, lends the system to more flexible compliance options. While the ability to display line-items in multiple currencies is not available, that enhancement is squarely on the product enhancement roadmap. Future investment in European-based operations is a critical element to Mitratech's strategy and success in new markets outside of the US. Mitratech's recent opening a London-based office certainly underscores its desire to compete internationally.

Competence without consistency or proper follow-ups can only take one so far. Thus, in terms of implementations and support, Mitratech continues to make significant investment in standardizing processes, building process libraries as they work on sophisticated implementations with clients and extending service capabilities. Additionally, a defined mobility roadmap provides full functional access including line item processing and matter access. Historical issues of backlog and responsiveness are seemingly not as prevalent, as client interviews we conducted indicate satisfaction with responsiveness, training and the value placed on client feedback through user groups and other modes of direct engagement. To demonstrate a high level of customer commitment, Mitratech announced it would begin offering free upgrades from 4.0, so long as clients follow their listed best practices for implementing the upgrade to 4.0 itself.

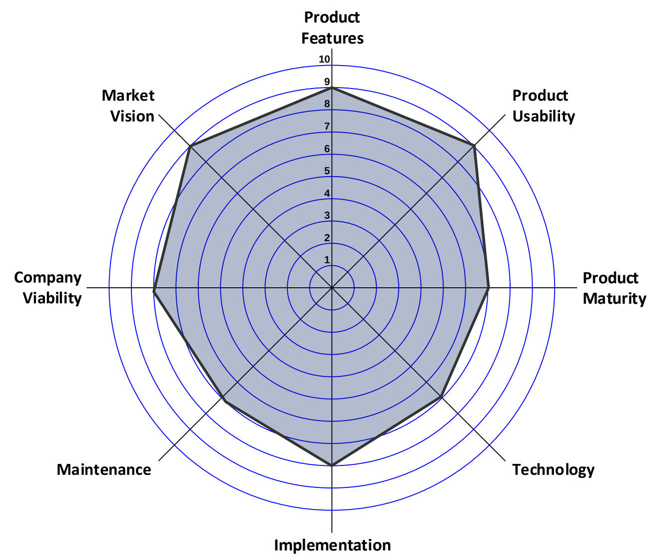
In our assessment of TeamConnect, the following capabilities have been given special recognition:

RECOGNITION	FEATURE
	Overall Breadth: Provides a well-developed, comprehensive set of ELM modules, plus development platform for custom applications and interfaces
	Implementation: Extensive—and expanding--set of pre-defined templates and configuration tools; "zero code" customization; for more sophisticated law department requirements

RECOGNITION	FEATURE
	Docket Calendaring: Interface to Compulaw supports automated case docketing and matter management

The following is our review of Mitratech and TeamConnect according to our VendorView™ criteria:

MITRATECH – TEAM CONNECT



CATEGORIES	RATING (1-10)	EVALUATION NOTES
PRODUCT FEATURES	9	▪ Full suite of ELM modules ▪ Platform model supports advanced application development ▪ Homepage dashboard with graphical elements ▪ Deep native integration to Outlook and MS Office Suite ▪ Advanced BI reporting ▪ Native DMS and document assembly ▪ Current focus on enhancing international features ▪ Robust legal hold functionality
PRODUCT USABILITY	9	▪ Well-designed UI ▪ User personalization of screens and information ▪ Expanded use of “wizards” and drag-and-drop customization ▪ Use of rich interface components

CATEGORIES	RATING (1-10)	EVALUATION NOTES
		▪ Ease of use for attorneys through Outlook ▪ Browser agnostic ▪ Opportunity to extend collaboration features to external users
PRODUCT MATURITY	7	▪ Well-established platform model ▪ Consistent flow of new enhancements ▪ Established design and functional approach ▪ High-percentage client upgrade
TECHNOLOGY	7	▪ Leading Java architecture ▪ Meets or exceeds enterprise standards for infrastructure and security ▪ Web services portal ▪ SAS70 Type II certified hosting partner
IMPLEMENTATION	8	▪ Sophisticated implementation methodology ▪ Improved efficiency with templates and tools ▪ Expanded "out-of-the-box" API layers ▪ Extensive set of configuration and development tools ▪ Pre-defined interfaces ▪ Well-developed implementation partner program ▪ TSIA certification. ▪ Complexity may be less suitable to the mid-market
MAINTENANCE AND SUPPORT	7	▪ Annual software maintenance program ▪ Live U.S. helpdesk support ▪ Dedicated client relationship managers ▪ Extensive programming for client feedback ▪ Sophisticated training program ▪ Certified training resources ▪ Well-defined, client-oriented product roadmap
COMPANY VIABILITY	8	▪ Established market presence with long-retained customers ▪ Experienced management team ▪ Consistent investment in products and services ▪ Less exposure to small-mid market ▪ Efforts to raise e-billing profile are underway.

CATEGORIES	RATING (1-10)	EVALUATION NOTES
VISION	9	▪ Consistent enhancements aligned to market needs ▪ Continued growth in both core and adjacent ELM areas ▪ New London office highlights commitment to international growth ▪ Extension to hosted and SaaS-based model ▪ Company pitching new prospects on a "10-year relationship"

Selecting and Implementing Enterprise Legal Management Systems

The review and selection of vendor partners can be a complex and time-consuming task. We recommend that clients consider the product's features and capabilities, as well as the company's strengths, in their selection process. Clients should use a comprehensive set of criteria to determine their best vendor-partner fit. These criteria should include the vendor's existing features, future product roadmap, company stability, ease of deployment and user adoption success.

To assist our clients in their e-billing and matter management system selection processes, we have developed the following guiding principles:

- **Start with a well-defined set of user needs and requirements**. In reviewing the e-billing and matter management market, we encourage clients to use our Key Solution Components. These should be considered a minimum set of capabilities and a starting point for developing the client's specific list. We find that many e-billing and matter management selection projects lack the understanding of business processes and requirements, in sufficient detail, that are required for a successful vendor selection.

- **Understand the vendor's licensing model and pricing**. Purchasing software involves a number of important, interrelated considerations: license type, usage scope, maintenance and support, installation location, and license fee calculation, are all critical dimensions of the software purchase. We find a range of practices amongst vendors in the e-billing and matter management software market. While no model is inherently advantaged or disadvantaged, licensee-purchasers are well-advised to understand their vendor's approach and how this might impact their business objectives.

- **Closely scrutinize vendor references**. The e-billing and matter management market is covered by many vendors. Company size (large or small) and market reputation (good or bad), may be considerations but should not replace direct client references. References will provide added perspective, and should allow for clients to ask questions and gain better understanding of experience in working with the vendor.

- **Review the vendor's business plan and financial condition**. The e-billing and matter management market is accurately considered a niche area. Unlike other technology areas—such as ERP, CRM and financial systems—that are dominated by the likes of Microsoft, Oracle, and SAP, the e-billing and matter management market vendors are comparatively small. Those products operated within large companies may nonetheless be businesses of relatively comparable size to stand alone e-billing and matter management vendors. Clients should ask for specific financial plans about the e-billing and matter management software business specifically, including revenue and R&D investment.

- **Understand product development approach and history**. While current features are important, your vendor relationship will be long term. Clients should consider the roadmap for new features and the vendor's history of new releases and on-time record. Clients should also understand the process for defining enhancements and how they are made available. Importantly, clients should understand whether new enhancements are included as part of their license or support.

- **Evaluate implementation capabilities and options**. The success of a new system is determined by the success of the implementation and user adoption. While features drive product selection, the vendor's demonstrated experience and success in implementation is a critical consideration. This includes setup, infrastructure, configuration, data conversion and training. Clients should be open to considering in-house implementation (it may be a red flag if a vendor will not allow client's internal resources for implementation) or the use of an external implementation consultant. No other category of technology is more manifest in its configuration of the processes that drive it – it is critical that implementation activities focus on the “use” of the system at least as equally on the “installation” of the system.

Ordering the Report

Our MarketView™ Reports are an excellent resource for understanding the trends, leading practices and solution options available to our clients. Our goal is to impart a solid foundation of knowledge about the market so that your organization is able to achieve success in its selection and implementation process.

In addition to the written report, our MarketView™ Report includes a 60-minute briefing session. The briefing session provides an opportunity for your team to meet with our analysts to ask questions and address their particular areas of interest.

For additional information or to order the report, visit our website (www.hgpresearch.com) or contact us at info@hgpresearch.com.

About Hyperion Research

Hyperion Research is the legal industry's premier source of independent market research and advisory services. We provide unparalleled insight to the leading trends in legal strategy, operations, and technology. We work with law departments, law firms and other legal service organizations to make intelligent, fact based decisions about how to improve their operational performance. We also work with solution providers, including software vendors, professional service groups and consultants, to better understand the latest market trends and the needs of their customers.

For more information, visit www.hgpresearch.com.

About Mitratech

Mitratech is the leading provider of fully integrated enterprise legal management solutions for global legal departments of all sizes, including more than 25% of the Fortune 500 and more than 220 organizations in all. Mitratech's offerings include the flexible, comprehensive, and trusted TeamConnect and Lawtrac product platforms, both of which offer end-to-end matter management, e-Billing, legal hold, contracts management, entity management and GRC solutions. Mitratech clients are able to prove demonstrable value creation for their organization by automating legal workflows, improving business outcomes through actionable data and insight, increasing collaboration with external partners and reducing overall legal spend.

For more information, visit www.mitratech.com.

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