

The Industry Application Platform

LEGAL MARKET CHALLENGE

As a consequence of new entrants, increased client expectation and continuing fee pressure, the battleground of legal services is shifting to the client experience. In this rapidly evolving landscape firms will live or die based on the customer experience they provide. Increasingly the success of a firm will rely as much on technology as it does on the culture and legal knowledge of the firm.

IT Challenge

The breadth, depth and pace of technology is now so vast that the investment required for developing, integrating and maintaining the range of software that a business requires is billions of pounds. This level of expenditure is beyond the reach of all but a few technology giants such as Microsoft, Oracle, Salesforce and IBM.

These tech giants are investing billions in core technologies that are common to all businesses, across all markets. Defined as an "Industry Application Platform" (or "IAP") these platforms provide the underlying framework onto which software vendors with industry domain expertise can build solutions for specific markets, such as Legal. As technology plays an increasingly critical role only firms that build technology on an IAP will be capable of responding to market changes and prospering.



The rapid advancement of technology, together with the market pressures legal firms face, mean firms require the strength and investment of an industry Platform. It's great to see Peppermint Technology, one of our top industry partners, deliver this to the legal market.

Microsoft

THE VALUE OF THE INDUSTRY APPLICATION PLATFORM

Solving the Complexity Problem

In recent years we have witnessed legal firms juggling investment across an array of technologies as they seek to stay competitive. While the importance of technology is increasingly recognised, firms find it a challenge to fund and manage. Many applications deliver significant value in their own right, but the art of getting them to work in harmony is complex, time consuming and expensive. When one software author changes something in their application it will most likely have an impact elsewhere in the firm's technology. The result is that firms are reaching a point of complexity where a disproportionate amount of their investment is spent on simply ensuring all their software applications continue to work together. This problem is increasing as new technologies emerge at a rapid pace.

The impact of technologies like the internet, bring your own device ("BYOD"), big data, machine learning and social media put a requirement on firms to increase the amount and pace of technology they consume. While this represents a great opportunity for firms to use technology for competitive advantage, it also comes with a risk. The danger is that the complexity grows to the point where it becomes too difficult, costly and timely to change, that it is counterproductive. In a highly competitive market where change is all around us, and critical to survival, this will hit the profit of a firm.

The same challenge is shared by software vendors trying to support firms. They have the difficult job of knowing where to invest. In a market where technology advancement is so rapid, and so broad,

it is impossible for software companies to keep pace with all developments. As well as introducing new technology, they have to amend and test current technology to ensure it remains working when new technology is introduced. These priorities often compete as newer technologies are added the underlying architecture becomes more complex. This results in technology companies investing a large proportion of their time and resource just to ensure basic compatibility, rather than delivering new business advantage through application development. This problem is symptomatic of the scale of investment now required to deliver a modern IAP. The consequence is slow and limited advancement of new functionality that law firms really need to remain competitive.

where the size of investment in the core technology is so high that only a few players build this. For example, in the airline industry Boeing and Airbus compete in building airplanes: individual airlines take one of these standard models and adapt it specifically for the needs of their target market and customers. Everyone benefits; all passengers fly on planes which are safe and compliant, whilst each airline adds value specific to the market it wishes to address.

The IAP approach is the next phase of evolution in the global technology market. In this approach the IAP owner delivers the complex engineering of common components allowing industry experts, such as Peppermint, to focus its investment on making the platform work for a given industry such as legal.



We concluded that the Peppermint CX Platform is best placed to enable us to achieve our strategic objectives. The single platform approach, and underlying Microsoft Dynamics platform, provides advantages and capabilities beyond those that alternative legacy providers could offer.

asb law

Large Scale Investment & Engineering

This problem isn't unique to legal firms, so the good news is technology giants such as Microsoft, Oracle, Salesforce and IBM are investing huge sums to address this very challenge. The solution to the problem can be found in the emergence of the IAP. The platform approach is where large technology giants, with the appropriate scale of investment and resource, build a base technology stack that delivers the most common technology components a business requires. Technology companies, such as Microsoft, have invested in packaging and maintaining several core technology components and applications in one platform.

The benefit of this approach is that many of the common IT components and applications (such as Microsoft Office, customer management, marketing, document management, social engagement, machine learning, collaboration tools, mobility apps, database, security, workflow, social media, browser support, mobility, device support etc.) are all taken care of by a major global vendor. The operation and cost of keeping all this in sync is down to them. They invest thousands of engineers, and hundreds of millions of pounds, to make this happen. The IAP approach can free up the time and budget of a law firm, or IT vendor, to focus on added value legal functionality rather than on just keeping the existing pieces working together.

Learning from Others

This model already exists in many other industries

The Peppermint Example

The Peppermint CX Platform is one example of this new model. Peppermint has built a comprehensive business solution for law firms, using the Microsoft Dynamics IAP. Firms using the Peppermint CX Platform can leverage the current, and future, investments of Microsoft, tailored and enriched by Peppermint for the legal sector.

The IAP approach will protect the investment a law firm makes against their technology becoming obsolete. It will also serve to ensure the firm can stay at the forefront of technology advancement to maintain a competitive market position.



Peppermint's single legal software platform transforms the role of technology from being a tool that supports the firm's operation into a strategic weapon that will accelerate our competitive advantage.

Mayo Wynne Baxter

THE PEPPERMINT CX PLATFORM

Peppermint has embraced the enormous investment of Microsoft's IAP, Microsoft Dynamics CRM and tailored it for the legal market. Peppermint has made the Microsoft IAP accessible to every legal firm; a platform previously only within the reach of law firms with very large IT budgets.

The complete SaaS Solution for legal service providers



Anyone, Anywhere, Anytime, Anything

What is the Peppermint CX Platform

The Peppermint CX Platform is the award winning legal software built on the Microsoft Dynamics Industry Application Platform. It brings together in one place all the applications, transactions, collaboration and content tools required to operate a high performing legal business.

The Peppermint CX Platform combines and connects the different software applications required by a law firm through a single source of data. It is architected to have the client profile at the centre thus transforming the business into a customer centric organisation.

The CX Platform continuously connects every data point, task and business process via the client profile, to transform every person into a proactive customer service agent. This client centric approach delivers a highly personalised, instant, and consistent experience for clients, partners and staff across all channels, anytime, anywhere.

It offers a range of software applications all working natively together. This is complimented with a suite of collaboration tools that allow firms to share and collaborate around data and applications. Add to this the Platform's ability to consume and present

highly tailored content, then law firms can transform the delivery of legal services whilst improving the efficiencies of their back-office operation.

Applications

The applications in the CX Platform work natively with each other. They are all connected to a single database and to the client record. This offers immensely powerful business benefits as there is only ever one view of the client, data and activity, so there is no need to spend time, money and effort on complex integration. This not only reduces the cost of IT but most importantly allows the business to quickly create new processes and services and rapidly adapt to change.

The workflow and reporting tools within the CX Platform work seamlessly across all applications and data. This makes it very easy to automate any process or task across any department as well as providing instant reporting to a granular level. All this is possible because the tools are not just bolted on, but work natively within the CX Platform. They are also intelligently designed to consume content and be utilised within the Platform's collaboration tools so that it is not just staff that benefit, but services can also be extended to external clients and business partners.

Matter & Case Management

Workflow & Business Process Management

Document Management

Business Intelligence & Reporting

Risk Management

CRM, Marketing & Business Development

Transactions & Financial Management

All Matter related financial data points, activities, tasks and processes are natively connected to the client record, as well as other applications and content within the CX Platform. This approach allows real time insight and control of the firm's financial matters while ensuring a high level of proactive service to both internal and external clients.

The power of the CX Platform working across the entire business means that finance is no longer designed to be a back-office service. Instead, the Platform enables every person and task to be connected and presented with the relevance of the firm's financial position.

Practice Management

Billing & Time Recording

SRA Compliant Legal Accounts

Extensive real time financial management & reporting

Self-service & automated billing with authorisation & approval tracking

Customised financial dashboards to individual level

Workflow and business process management of financial data anywhere in the business

Online financial service offerings for clients & business partners

Self-service & automated requisition requests with authorisation & approval tracking



Moving to a modern Microsoft platform gives us the latest technology foundation to support and accelerate the firm's growth. The client centric, single platform approach provides us with the intelligence to deliver a personal and efficient service to clients. It also ensures we have absolute clarity of the firm's position at any time.

Brethertons Solicitors

Collaboration

Platform collaboration services offer a suite of engaging collaboration tools that enable firms to provide interactive online self-service and self-assessment to clients, partners and staff, 24/7. The service is not intended to replace other modes of engagement but support and complement them, giving a choice to clients, partners and staff of how and when they engage with the firm.

A full suite of internal collaboration tools are also available to support staff working. Staff can work effectively across different offices, geographies and remotely, using the latest technology to support them. The CX Platform leverages advances in social media type collaboration to make it easy for staff to be informed in a manner which is highly relevant to their role and preferences.

Interactive legal online services portal for clients & business partners

Social media console for internal / external engagement

Online self-assessment & data capture tools

Deal Rooms

Document Hub

Integrated telephony & unified communication

Mobile working

What's New Wall

Content

The Peppermint CX Platform is designed to consume and present content from, and to, multiple sources. It doesn't have the restrictions found in legacy software that make it difficult and costly to integrate to 3rd parties. The CX Platform was designed for a generation where the sharing of data is the norm and embraces industry Microsoft standards to ensure the design and integrity of the data is secure.

This approach makes it easy for firms to push knowledge to their staff in a relevant context that will improve their ability to serve clients. The same design makes it easy to on board external content into Platform from 3rd parties, such as publishers, clients, partners and agencies, all of which aids the streamlining of process and improves service levels.

Peppermint Knowledge Centre

3rd party content & service integration

Legal content integration

Peppermint App Shop

Self-generated content

Internal content sharing

Machine Learning

Content Packs

Summary

The Peppermint CX Platform leads the way in bringing the benefits of the Microsoft Application Platform to the legal market. Combining Peppermint's legal expertise with the huge investment of Microsoft delivers a Platform for legal firms that optimises a firm's best possible ROI on technology spend. Most importantly, the CX Platform removes the complexity of legacy software that so often restricts a firm's ability to rapidly advance the delivery of compelling and highly relevant legal services to clients, business partners and staff.

Peppermint CX Platform is the Platform of choice for legal service providers looking to be the firm their clients want them to be.

FOR MORE INFORMATION

www.pepperminttechnology.co.uk | 0115 838 9300 | info@pepperminttechnology.co.uk

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TECHNOLOGY