



## Legal IT Innovators Group - [www.litig.org](http://www.litig.org)

### Litig Suppliers Charter

#### 1 Prove that you know us

- (a) Please do your research and try to understand our business;
- (b) Check what systems we use before you contact us to avoid wasting everyone's time;
- (c) Ensure continuity of information and seamless handover between account managers. We only want to communicate information once.
- (d) If you do not have demonstrable references (see below) for all aspects of the products/services you are proposing, please disclose this up front.
- (e) If you think that our needs would be better handled a different way, (even if this means you not winning our business), please say. This is much more likely to build a good long term relationship based on trust and lead to future projects.

#### 2 Lines of communication

- (a) Please do not run multiple channels of communication as it causes confusion and frustration. Identify the correct person to talk to and maintain contact with them. If in doubt, confirm the appropriate person through the IT Director or his/her nominated deputy.
- (b) Please leave complete telephone messages: full name, organisation, phone number and purpose of call;
- (c) Please do not approach partners or management directly about IT. It wastes time and causes confusion and frustration
- (d) If you send us information regarding your company, products and services unless otherwise agreed please allow a decent period of time before making a follow up call. Please respect any requests not to make a follow up call.

#### 3 Software Licences and Contracts

- (a) Be open and honest about the licences/modules we need – say what products are included, what other products are available/planned and specifically, what is excluded from any deal;
- (b) Include a clear statement re: chargeable and non-chargeable work/versions and what constitutes the criteria for charging;
- (c) Where clients contribute to development work please include a clear statement in relation to IP ownership;
- (d) Contracts should be written in plain English and be fair and balanced. You are expected to be flexible in relation to contract changes. Be prepared to contractually warrant any verbal or pre-sales claims you make;

- (e) Include accurate SLAs which are achievable. You will be held to them.

#### 4 **Invitations to Events**

- (a) Please do not adopt a “scattergun” approach to invitations – agree the process for issuing invitations with the IT Director rather than just issuing them randomly. Often multiple people cannot be out of the office and we need to be co-ordinated;
- (b) Please try to give 6 weeks notice in relation to any invitation – often it is difficult to attend good events as diaries are already full when invitations are issued at late notice;
- (c) You must declare to the IT Director, any gifts or hospitality you give to our people;
- (d) Please communicate the dates of independent user groups/product conferences months in advance (especially when overseas) and direct invitations to or through core contacts (as mentioned in point a).

#### 5 **Reference Sites and Confidentiality**

- (a) Please keep all information, documentation, discussions (and the fact we are having discussions with you) totally confidential unless otherwise agreed with us;
- (b) Please only tell us about people who you have already agreed are happy to be mentioned and who are happy to be contacted;
- (c) Do not use us as a reference site unless agreed with us in advance;
- (d) Please be totally honest when describing reference sites and the products/solutions they are using and any issues they may have had.

#### 6 **Roadmaps and User Groups**

- (a) Please hold regular user group meetings;
- (b) Please hold an annual product conference (unless otherwise agreed);
- (c) Please publish and keep up-to-date key product roadmaps, setting out how your product interfaces with other key products used in the legal market (in particular Microsoft products). Please be open about how your products interface with other software and technologies.

#### 7 **Account management**

- (a) If you become one of our suppliers, we would expect to be allocated a dedicated account manager.
- (b) Depending on the nature and type of services and/or equipment you provide us, we would expect to be provided with an escalation procedure to be used in the event of any issues arising during the contract period.
- (c) We would expect regular account review meetings between the relevant people in our respective organisations.
- (d) Where the services you provide are subject to competitive pressure, we would expect you to review your pricing on a periodic basis and within the terms of our agreement and alert us to any cost saving opportunities.

8 **Our People**

- (a) Please always be polite to our people and respect their time;
- (b) Do not solicit our people;
- (c) If you propose to recruit one of our people please remember that you principally know them due to our introduction/relationship and the fact we are clients or potential clients. Accordingly please agree an introductory payment with us.

9 **Presentations**

- (a) Please send through helpful documentation, reports, responses to questions etc in advance of any presentation;
- (b) Please agree attendees, equipment needs, and agenda in advance. Please focus any presentation on the needs of attendees and keep it succinct;
- (c) Please prepare and ensure any presentation is relevant and to the point. Quality not quantity is key.
- (d) Be open and honest about your products/services, including their strengths and weaknesses.

10 **CSR**

- (a) Please be open about your Company's stance on CSR and how aligned it is with our business;
- (b) Please try to be "Green" in relation to how you develop and maintain the relationship (e.g. literature, methods of travel, conference calls, video conferencing etc.)

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