

G-Cloud15 Access CaseMatters Evo Pricing Document

1 Access CaseMatters Evo

Access CaseMatters Evo is an application based Legal Case and Accounts Management solution. Access CaseMatters Evo case and practice management systems help more than 25,000 professionals across 850 law firms be more efficient and more productive – freeing up time for fee earners to focus on what they do best.

The time-saving nature of Access CaseMatters Evo allows fee earners to complete tasks much faster than ever before. Using automation, routine paperwork and client communications can happen in minutes rather than hours.

2 G-Cloud Specific Pricing

The following represents G-Cloud specific pricing for Access CaseMatters Evo. Pricing is based on the number of documents (not pages) that will be expected to be processed per annum.

Description	CaseMatters Modules	FlightPath Delivery	Pricing per User per Month
5 to 20	2	FlightPath A	£79.00
21 to 50	2	FlightPath B	£76.00
51 to 100	2	FlightPath C	£73.00

The above prices exclude Hosting Costs and span the below types of licence:

- CaseMatters Evo Users – Standard
- CaseMatters Evo Users - A2A
- CaseMatters Evo Users – Cashier
- CaseMatters Evo Users – FileView
- CaseMatters Evo Users - Task Server
- CaseMatters Evo Users – Webservice

The below reflect CaseMatters Accounts Package, extra workflows, modules and integrations, including set up. List of all workflows, Modules and Integrations in section 5.

CaseMatters Software Addons (including set-up)	Software spend per month
Any Extra Area of Law Module (3rd Module +)	£150.00
Accounts Module	£500.00
CaseMatters Integration – Bundle+	£95.00
CaseMatters Integration – Caseviewer	£10.00
CaseMatters Integration – CCBC	£150.00
CaseMatters Integration – EL/PL Portal	£110.00
CaseMatters Integration – Land Registry Business Gateway	£165.00

CaseMatters Integration – LegalBricks AML, Biometrics & Searches	£120.00
CaseMatters Integration – LegalBricks AML	£95.00
CaseMatters Integration – LegalBricks Biometrics	£95.00
CaseMatters Integration – LegalBricks Searches	£95.00
CaseMatters Integration – OIC Software	£110.00
CaseMatters Integration – Perfect Portal	£200.00
CaseMatters Integration – Legal Payments	£110.00
CaseMatters Integration – SDLT+	£95.00
CaseMatters Integration – Wills / Arken	£110.00
CaseMatters Integration – Touchpoint+ - 5 Users	£235.00
CaseMatters Integration – Touchpoint+ - 6 to 10 Users	£285.00
CaseMatters Integration – Touchpoint+ - 11 to 25 Users	£385.00
CaseMatters Integration – Touchpoint+ - 25+ Users	£490.00

Once you have calculated the total software package you must attach a Customer Success Plan, this works on a banded attach basis with different %s on the segments of Software Spend, outlined below.

Banding	Standard CSP %	Premier CSP %	Software
First Banding	15%	25%	Up to 100k
Second Banding	12%	20%	>100k – 200k
Third Banding	8%	12%	>200k – 500k
Fourth Banding	5%	8%	>500k

For example, a customer who is spending £600,000 would calculate their Standard Success plan price as follows;

Banding	Standard CSP %	Software Spend Applicable to	Applicable Spend	Software
First Banding	15%	Up to 100k	£100,000	£15,000
Second Banding	12%	>100k – 200k	£100,000	£12,000
Third Banding	8%	>200k – 500k	£300,000	£24,000
Fourth Banding	5%	>500k	£100,000	£5,000
			£600,000	£56,000

You will also need to a Customer Success Plan, matched to the same tier as your core software's plan.

Banding	Standard CSP %	Premier CSP %	Software Spend Applicable to
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Workspace Standard	5.75%	6.25%	Total Software Spend
Workspace Professional	17.25%	18.75%	Total Software Spend

Evo Everywhere

Evo Everywhere is the AI platform provided with all Access solutions, delivering enterprise-grade AI capability within the customer's own security perimeter. Included within the platform base fee, all users have access to Evo Navigator and Evo Workflows. Power user licences additionally unlock Evo Researcher (knowledge synthesis and information retrieval), Workflows AI and the ability to Run Agents.

Tier	Platform Base Fee	Power User Licence
Evo Everywhere	20% of annual cost	£50 per user per month

CaseMatters Evo inclusive allowance: 500 Legal Copilot queries, 500Mb Collaborate Memory, 5Gb Analytics Memory, 5,000 refreshes.

- £180 ARR per additional 500 Copilots
- £180 ARR per additional 5Gb Analytics memory
- £180 ARR per additional 5,000 Analytics refreshes
- £500 ARR per additional 500Mb Collaborate memory

Extra Services and Training

Set up costs for Professional Services at a daily rate (dependant on number of days required) to include incremental Project Management, Training, Installation, and Configuration

Description	Pricing
Day Rate	£900
Out of Hours Rate (Weekday Evening)	£1200
Out of Hours Rate (Weekend)	£1350
Out of Hours (Bank Holiday)	£1800

And below are set prices for services and training deliverables based on a £900 day rate.

Data Migrations	Payable Upfront
Price on Analysis Scoping	TBC

Training Addons	Upfronts
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Management Information Workshop	£450.00
Server Health Check	£1,800.00
Automation Workshop	£900.00
CaseMatters Go Set Up	£900.00
Advanced Reports Training	£900.00
Conveyancing Workflow Training	£900.00
Credit Control Training	£900.00
Customer Handholding - remote	£900.00
Debt Working Training	£900.00
Family Workflow Training	£900.00
Floorwalking - Onsite	£1,350.00
KPI's Key Performance Indicators Training	£900.00
OPG-COP Workflow Training	£900.00
Out of hours system upgrade	£1,554.54
Personal Injury Workflow Training	£900.00
Probate Workflow Training	£900.00
CaseMatters Business Intelligence Training	£900.00
CaseMatters Accounts User Level 1	£900.00
CaseMatters Accounts User Level 2	£900.00
CaseMatters Tables Training	£900.00
Regular Delegate Day Training Place	£327.27
Technical Level 1 Training	£900.00
Technical Level 2 Training	£900.00
Technical Level 3 Training	£1,800.00
Technical Level 4 Training	£900.00
TouchPoint+ Training Workshop	£450.00

- Mobile device available to enable MFA. Single factor authentication not permitted
- Additional tenant required – Access will provide most cost-efficient MS365 licences, but this is excluded from the pricing
- Software Migration Setup is applicable to existing customers. This is not required for new customers.

Hosting

Access CaseMatters can be hosted within Access's multiple secure, UK based data centres. This means you don't need to invest in hardware and infrastructure to host in your own environment.

The following represents G-Cloud specific pricing for Access Legal Hosting. Pricing is based on the number of named users that will be expected to use Access Legal Software.

Users	Cloud PC Lite	Software Migration Setup
5	£103.00	£33.33
6	£91.00	£27.78
7	£83.00	£23.81
8	£76.00	£20.83
9	£72.00	£18.52
10	£71.00	£16.67
11	£67.00	£15.15
12	£64.00	£13.89
13	£62.00	£12.82
14	£60.00	£11.90
15	£58.00	£11.11
16	£56.00	£10.42
17	£55.00	£9.80
18	£54.00	£9.26
19	£53.00	£8.77
20	£52.00	£8.33
21	£51.00	£7.94
22	£50.00	£7.58
23	£49.00	£7.25
24	£49.00	£6.94
25	£48.00	£6.67
26	£47.00	£6.41
27	£47.00	£6.17
28	£46.00	£5.95
29	£46.00	£5.75
30	£46.00	£5.56
31	£45.00	£5.38
32	£45.00	£5.21
33	£44.00	£5.05
34	£44.00	£4.90
35	£44.00	£4.76
36	£43.00	£4.63

37	£43.00	£4.50
38	£43.00	£4.39
39	£43.00	£4.27
40	£42.00	£4.17
41	£42.00	£4.07
42	£42.00	£3.97
43	£42.00	£3.88
44	£41.00	£3.79
45	£41.00	£3.70
46	£41.00	£3.62
47	£41.00	£3.55
48	£41.00	£3.47
49	£41.00	£3.40
50	£41.00	£3.33

Notes on Hosting Pricing / additional services

- Pricing is per named user per month
- Monthly fee invoiced monthly in advance
- Software migration setup is per user per month
- Set up costs included in monthly fee
- Pricing is for hosting only, and excludes software licenses
- Excludes VAT

Assumptions & Conditions - Hosting

- 50 GB personal storage per user pooled across the business
- Endpoint management excluded
- Valid, supported endpoint is already available to access this service, if not see Access Managed Device Solutions offering
- Mobile device available to enable MFA. Single factor authentication not permitted
- Additional tenant required – Access will provide most cost-efficient MS365 licenses, but this is excluded from the pricing
- Software Migration Setup is applicable to existing customers. This is not required for new customers.

Example

Organisation has a requirement for 50 named users to connect to Hosted Access Legal Software, and is a new deployment.

Cost would be £2050 per month exclusive of VAT

Hosting Onboarding fees are included in the monthly fee

3 Implementation Methodology

We aim to provide you with an excellent experience in getting up and running. Our Implementations packages range from small site implementations using our rapid FlightPath Implementation packages right up to larger solution projects where we would use our Access Implementation methodology. For the set-up process to be as successful as possible, we need to work together to achieve this.

Access FlightPath

Our FlightPath services have been designed to be remote-first, providing you with an improved low-risk implementation journey, no matter how your organisation is structured or wherever your employees are working.

We use video technology to facilitate face to face contact, so you still get the hands-on benefit of working with an Access expert and our years of software deployment expertise. We have also invested in product e- learning, so your users can learn our products at their own pace.

Our remote-first approach means that you have regular, accessible communication with us to keep you on track at every step of your journey and that your software can be delivered flexibly to suit the needs of your organisation and employees.

All our FlightPath consultants and on-boarders are not only certified in our products, they are also trained and certified in our remote-first FlightPath implementation methodology, including training in effectively delivering remote customer projects.

Each FlightPath implementation programme from Access follows a well- defined journey with key milestones. These milestones represent – at a high level – the individual phases of your implementation journey. We'll be using these milestones to help us both track and communicate progress towards successfully launching to your users. Our aim is to give you value from your investment as quickly and as fully as possible. Using our years of software deployment expertise, we have defined the FlightPath methodology. This is a journey based on best practice and designed to deliver timely value to you and your colleagues. And while it is ultimately your journey, we are here to support you all along the way.

Clear roles and responsibilities

At the 'Getting Started' milestone phase, you will receive a Welcome Pack. In here you'll find clarity on roles and responsibilities. What you'll need to do, and what we will do. Crucially our FlightPath approach also clarifies our joint expectations, helping us both understand the process that we will jointly commit to, in order to successfully launch your chosen software to your end-users in a timely and efficient manner.

Your onward journey

Even when your implementation has successfully landed, and you are in a position to go live with our software, we will ensure that you are successfully transitioned to the care of our Success Team.

The Success Teams include our support colleagues and Customer Success Managers and will be available to support you as you use your software and realise the benefits of your investment in your Access Solution.

Full details of our Flightpath implementations for Access CaseMatters can be found [here](#).

4 Service & Support Management Details

Providing you and your users with a high level of incident support is of prime importance to us. As well as being able to answer your queries, our support staff will also be able to inform you about the latest software releases, and provide hints and tips to ensure you are getting the most out of your product. To emphasise the importance of support to Access we have over 500 employees in the UK in our Support and Customer Success functions.

Support Commitment

We recognise that the systems, software and services we supply may be critical to the well-being of your business. Our aim is to ensure that you have continuous operational capability from our products. We will help you to achieve this by providing efficient support, resolving the majority of tickets at first-line contact.

We will help you maximise your return on investment by providing the best in technical assistance, advice and customer care. We own your support queries and will ensure that they are resolved as promptly and efficiently as possible.

We provide 3 main support plans as detailed below.

The Essential Plan

The online service The Essential Plan is available to all Access customers as part of your license fee and provides you with easy-to-access online support for all your queries, facilitated via our Customer Success portal.

The Standard Plan

Get answers faster

As a Standard Plan customer you benefit from faster response times and can access our support teams via telephone and live chat, as well as through our Customer Success portal. To help your team be more productive, you are provided with continued access to our e-learning content as well as a programme of Success webinars, designed to keep you up to date with new features and share best-practice advice and guidance.

The Premier Plan

Boost productivity with direct access to the experts and achieve a higher return on investment

Our Premier Plan enables your team to achieve more and improve productivity through an ongoing relationship with your own designated Customer Success Manager. Your CSM will get to understand how you're using the technology and will advise you on how to get more from it.

Full details of our Customer Success Plans can be found here [Customer Success Plans](#)

Modules

- CaseMatters Module – Claims
- CaseMatters Module – Conveyancing
- CaseMatters Module - Cost Drafting
- CaseMatters Module - Credit Control
- CaseMatters Module – Crime
- CaseMatters Module – Debt
- CaseMatters Module – Employment
- CaseMatters Module – Family
- CaseMatters Module - Financial Misselling
- CaseMatters Module – General
- CaseMatters Module - In House Legal
- CaseMatters Module – Mediation
- CaseMatters Module – Medico
- CaseMatters Module - New Business Enquiry
- CaseMatters Module - OPG-COP
- CaseMatters Module - Personal injury
- CaseMatters Module - Probate