Choosing the right legal software

A due diligence checklist

☐ Technology
Decide upon your firm's technology needs

- ☐ Review your current IT. Do you need major upgrades to hardware and/or software?
- ☐ Evaluate the hardware requirements for the software solution you are considering
- ☐ Confirm if the software provider offers a choice of cloud/hosted environment, local server based or both
- ☐ If cloud based or hosted in the cloud, ask who owns the data, where is it stored, how the data is secured and how its backed up
- ☐ Discover whether you can retrieve your data easily and in what timeframe, should you change software in the future
- ☐ Ask how much control you will have over your data or access to your raw data
- ☐ Ask for timeframes and match these to your firm's expectations and resources
- ☐ Ascertain if there are any add-in programs or whether the software is fully integrated

☐ Firm
Confirm your strategic imperatives for change

- ☐ Identify why you want to change your software
- ☐ Discuss pros and cons for your current software
- ☐ Create a list of functional requirements including remote working needs
- ☐ Involve your IT person/company
- ☐ Explore and decide on whether you want a cloud, hosted or in-house server solution
- ☐ Identify your business' needs now and in the future, e.g. new business, better client service, mobility, and streamlined office processes etc
- ☐ Identify the steps and timeline needed to achieve your goals
- ☐ Speak to other firms about their software solution and their strengths and weaknesses
- ☐ Work out a budget
- ☐ Identify champions in your firm to assist in the review and change process
- ☐ Review software from three or four providers

☐ Functionality
Provide and discuss your functional requirements with each software provider regarding:

☐ Practice Management	☐ Document Production	☐ Word Integration
☐ Accounting	☐ Precedent Management	☐ Conflict checking
☐ Workflow	☐ Payroll	☐ Real time Dashboard – tailored to roles
☐ Task Management	☐ Archiving	☐ Task Management
☐ Reporting - Comprehensive suite and adhoc	☐ Safe Custody	☐ Outlook Integration
☐ Trust Account features that comply with State regulations		

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Integration partners
Is the product closed or open?

- [ ] Who are the partners they integrate with?
- [ ] How does this relationship work?
- [ ] Do they receive referral fees?
- [ ] Ask if training is provided, at what cost and what it covers
- [ ] Are they considering other integration partners?
- [ ] Can you still use other programs?

Support Model
Ensure your firm will receive adequate support

- [ ] What is the service level agreement for support, including response times?
- [ ] How do you log a support call, e.g. phone, email or online portal?
- [ ] Are there ongoing charges for support?
- [ ] Is training provided pre and post installation?
- [ ] Are there ongoing charges for training?
- [ ] Are help manuals provided and in what format?
- [ ] Is there a local team in your state?
- [ ] Do they have a user group and how often do they meet?
- [ ] What is the procedure for feedback and recommendations?
- [ ] Ask for contact details for references from 3 existing clients

Implementation Process
Protect your firm from unnecessary downtime

- [ ] What support is provided during the conversion and transition to the new system? Are there additional costs for onsite support?
- [ ] What's included in the implementation process and how long will it take?
- [ ] Do they have an implementation strategy and can they provide a copy?
- [ ] What are the roles of the staff involved?
- [ ] What staff are required at your firm?
- [ ] Can they migrate your data (including financial) and is there an extra cost?

Pricing
Forecast the impact of changing costs

- [ ] Understand the pricing model and the ongoing financial commitment. Can you on-charge the fee as a file opening charge to the client?
- [ ] Calculate the impact if your firm grows or downsizes, as well as the three-year return on investment
- [ ] Discuss the provider's finance options

Development
Will the software continue to adapt and grow?

- [ ] Is there continued development of the software?
- [ ] How often are major updates and releases?
- [ ] Does the software integrate with third-party providers? Discover which ones and how will this improve your office efficiencies
- [ ] What is their response time to program bugs?
- [ ] Are there additional costs for updates or hot fixes?
- [ ] What is their development strategy for the next three years?
- [ ] How much customisation can you implement to suit your firm's processes?

Contract
Independently review your contract

- [ ] Review and understand the terms and conditions
- [ ] Ascertain if you are locked in and for how many years
- [ ] Calculate exit costs
- [ ] Is training included and what does it cover?
- [ ] Check what extra costs are included
- [ ] Does the contract stipulate how and what data will be retrieved and in what timeframe should you change software provider
- [ ] Discover the remedy for failure to supply
- [ ] Ask what isn't included in the contract and why
- [ ] Find out if there is CPI increase. If so, check when the contract is reviewed and price updated

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