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20 25 Legal Technology

Buyer's Guide

Your Roadmap To
Choosing the Right Software

The decision to purchase new law practice management software is about more than just features and functions. It's about choosing a platform that empowers your entire firm to thrive.

The legal market of 2025 demands faster turnaround, better client communication, airtight security, and flexibility for remote and hybrid work. At the same time, legal professionals face growing pressure to do more with less, which means you need technology to do your job effectively and efficiently. This guide is designed for anyone in a law firm who is involved in researching, evaluating, or selecting new software.

In five clear steps, you'll learn how to:

1. **Identify the key reasons to explore new software**, from inefficiencies and outdated tools to strategic, forward-looking goals like AI adoption and better client service.

2. **Assess your firm's unique needs** by gathering input across departments, setting a realistic budget, and prioritizing outcomes.

3. **Evaluate and compare vendors** using detailed questions covering every area from billing and accounting to client portals, integrations, and security.

4. **Implement your new system effectively** with strategies for data migration, configuration, training, and change management.

5. **Maximize your investment** through leadership buy-in, role-specific training, and ongoing reinforcement to ensure long-term success.

Whether you're replacing legacy systems or investing in your future, this guide will help you navigate the legal technology buying journey with clarity, confidence, and purpose.

How To Navigate This Guide

No matter where you are in the buying process for law practice management software, follow the steps outlined in this guide and refer to the page numbers noted for each step to stay on track throughout your buying journey.

STEP 1 **Understand Why You're Buying (Pages 5–7)**

- Identify your proactive goals (e.g., improving efficiency, client service, AI readiness)
- Recognize reactive triggers (e.g., system limitations, remote work needs, data security concerns)

STEP 2 **Assess Your Firm's Needs (Pages 8–11)**

- Build a cross-functional team of stakeholders
- Review current tech stack and workflows
- Identify pain points and wish-list features
- Set a realistic budget
- Define specific goals for the new software
- Evaluate current vendors' AI and API capabilities

STEP 3 **Choose the Right Vendor (Pages 12–16)**

- Define your must-have and nice-to-have features
- Review our list of common software features and capabilities and use the question lists in the Appendix to evaluate vendors on each feature
- Research vendor reputation, reviews, and client feedback
- Create a shortlist and issue an RFP
- Score proposals and schedule demos
- Conduct reference checks and review contracts carefully

STEP 4 Plan for Implementation (Pages 17–19)

- Assign a project manager
- Review vendor's implementation timeline
- Prepare for data migration (clean data, assess conversion scope)
- Configure software to fit your firm's needs
- Test the system before going live
- Deliver tailored training and prepare reinforcement plans

STEP 5 Maximize ROI and Drive Adoption (Page 20)

- Secure leadership buy-in
- Match training to each team member's role
- Reinforce with ongoing Q&A and resource guides
- Monitor usage and celebrate early wins
- Keep your team aligned with the original goals

Cutting Through the Noise

Running a law firm with technology that just can't keep up isn't sustainable.

Maybe your tools are clunky. Maybe they don't talk to each other. Maybe you're spending too much time chasing data instead of using it. Whatever the case, you know it's time for something better and that's why you're here.

At Centerbase, we've worked with firms in every stage of growth, and we understand how overwhelming it can feel to choose new software. The stakes are high. The features all sound the same. And everyone has a different opinion about what matters most.

This guide is here to help you cut through the noise.

It's built to give you clarity and a clear process to follow so you can find the right software for your team, your clients, and your goals. Along the way, we'll help you ask the right questions, avoid common pitfalls, and feel confident in your decision.

Let's get started.

STEP 1

Understand Why You're Buying

When evaluating new legal technology, law firms often find themselves at a crossroads, driven by proactive and reactive goals.

PROACTIVE GOALS

Proactive goals allow law firms to cultivate a culture of innovation and continuous improvement, align with industry trends, and experiment with cutting-edge tools.

Setting these goals helps the firm's leadership team to be forward-thinking and recognize the potential of technology to transform legal operations. This requires investing time and resources in researching emerging technologies, understanding their firm's needs, and seeking solutions that align with their long-term goals.

Take artificial intelligence (AI), for example. A proactive law firm goal might be to understand the potential AI technology has to increase productivity, enhance client services, and create competitive advantage.

Forward-thinking firms are already seeing real results with AI-driven features like:

- Automatic time capture that tracks billable activity across email, phone, and documents

- Document summarization and analysis to streamline complex research or case prep

- AI-powered intake assistants that help qualify leads faster and ensure no opportunity slips through the cracks

- Smart task and deadline suggestions based on matter type and case history

Firms with a proactive mindset aren't just future-proofing — they're gaining a real operational edge. They're asking vendors the right questions, experimenting with low-risk AI use cases, and creating internal policies to ensure AI is used responsibly and effectively.

The firms that succeed with AI aren't waiting for perfection. They're getting started and getting smarter as they go.

In our experience, proactive goals drive law firms to adopt new software for the following three reasons.

INCREASING EFFICIENCY

Proactivity helps firms identify pain points within their processes and seek innovative solutions before those pains multiply. They invest in modern technologies that address these challenges, fostering efficiency and productivity. By adopting new software, firms improve current processes, increase their agility, and position themselves for future growth and development.

IMPROVING CLIENT SERVICE

Clients typically expect law firms to deliver three things:
- Confidentiality and security
- Easy, on-demand access to their information
- Responsiveness to their questions

To meet client expectations, firms can proactively invest in technology that offers self-service client portals. These portals reduce the number of client calls to your staff while giving your clients easy access to the information they need. They also facilitate communication at convenient times for the client and their legal team.

Responsiveness translates into new business as well. When people search for legal representation, the firm that wins the business is often the one that responds first. From the start of the relationship, these firms make prospective clients feel like a priority, which helps them convert leads into clients.

MAXIMIZING COST SAVINGS

If your goal is increasing your firm's revenue, your initial reflex may be hiring more attorneys. But remember that, on average, attorneys only capture 2.3 billable hours a day. Capturing more of their time is the easiest way to skyrocket your revenue without hiring more staff. With the right technology, your timekeepers can enter time on the go so they never miss a minute. Some platforms automatically track and create billable events in real time as conversations occur by email, text, and phone.

REACTIVE GOALS

In addition to proactive improvements, many firms adopt new technology in response to external triggers. Common reasons include:

- Security breaches or compliance concerns
- The need for remote or hybrid work support
- Frustration with outdated or fragmented systems
- A costly server replacement
- Pressure from clients for better communication or transparency

If your firm is reacting to any of these challenges, this guide will help you make a forward-looking decision that avoids future headaches.

● Cloud vs. On-Premise: A Matter of Security

Addressing data security is a significant driver of seeking new technology, and it often involves comparing cloud solutions to on-premise servers. But cloud solutions (especially cloud-native ones) now offer greater security than most on-premise systems. Here's why:

- Cloud providers store your data in multiple secure data centers. If one server goes down, your data is automatically backed up and accessible elsewhere, which is something most firms can't replicate in-house.

- Cloud vendors push out security updates automatically, closing vulnerabilities before they can be exploited. In contrast, on-premise systems often go unpatched for weeks or months due to IT resource constraints.

- Cloud platforms encrypt your data both in transit and at rest, and many include 24/7 monitoring, intrusion detection, and AI-assisted threat response tools that are expensive or unavailable for on-premise environments.

- Cloud data centers have enterprise-grade physical security, including restricted access, surveillance, and environmental protections — all of which are difficult for a law firm to match on its own server closet.

STEP 2

How To Assess Your Firm's Technology Needs

When firms decide to invest in new technology, many dive headfirst into the search for a solution. But it takes time and effort to choose the right software, and the first step is taking a deep dive into your firm's preferences, pain points, existing technology, and goals.

● Build a cross-functional team

Too often, only a handful of people in the firm are involved in the software purchasing decision. That makes obtaining firmwide buy-in and adoption more challenging.

A better approach is assembling a team of stakeholders from across the firm. Ensure your group includes partners, associates, paralegals, and legal administrators, among other stakeholders. If you're a small firm, try to talk to everyone; if you're midsize, speak with at least one person from every department that will rely on the software.

Consult this user group to identify pain points in your current workflows and operations, such as slow document retrieval, inefficient case management, or poor data security. Explain to the group that you're shopping for new software and looking for internal feedback. Then, discuss their thoughts in person to ensure everyone feels engaged in the process.

● Review your current technology

The next step is assessing your current technology infrastructure. Take a comprehensive inventory of your hardware and software. Document all of your existing tools and technologies, including their age, specifications, and usage. Make sure to account for any software that your attorneys and staff use that may not be sanctioned by your firm.

Look to the future during this review phase, as well. Even if your firm doesn't utilize AI now, it's safe to assume AI will be part of your tech stack soon. You might as well start future-proofing for that possibility now.

Speak with your current vendors to understand their AI roadmap and AI usage within their platforms. Ensure you understand the underlying technology the vendor plans to use so your firm can take that into account during your technology assessment.

You'll also want to understand the API access available in your current software. APIs allow you to integrate your products and data with software and could speed up the transition to using AI when you're ready for it.

Then, using your team's feedback, identify any gaps in your current tech stack.

● Clarify goals and budget

Once you've gathered feedback from your team, distill it into clear goals. Focus on outcomes like reducing inefficiencies, improving client service, or supporting firm growth. Similarly, group any concerns your team has raised into themes like billing, accounting, and case management to help prioritize.

Then, establish a realistic budget that includes both upfront costs and ongoing expenses (licensing, training, support, etc.). Knowing your goals and financial parameters will help you evaluate solutions more confidently.

● Evaluate the software's AI

Regardless of your firm's current comfort (or discomfort) level with artificial intelligence, the reality is that AI is here to stay. And as AI becomes increasingly incorporated into legal technology, it's not enough for vendors to say they "have AI." You need to understand how it works, what it actually does, and whether it aligns with your firm's risk tolerance, compliance needs, and long-term goals.

Here's what to look for when evaluating AI capabilities in any legal software to ensure the AI works for your firm and works responsibly.

What type of AI is being used?

Not all AI is created equal. Understanding what kind of AI is powering a legal software solution helps you evaluate its true value and any potential risks. Here are the three most common types you'll encounter:

1 **Natural Language Processing (NLP):** Used for reading, summarizing, and extracting meaning from documents and communications.

- **Benefits:** Speeds up legal research, helps sift through large volumes of text, and makes it easier to find key information in contracts, pleadings, or emails.

- **Risks:** May miss context, especially with nuanced legal language. Accuracy depends on how well it was trained on legal-specific data.

2 **Machine Learning (ML):** Used for recognizing patterns, making predictions, and automating time capture or matter classification.

- **Benefits:** Great for repetitive or data-heavy tasks, like auto-filling time entries, flagging billing issues, or routing work based on past behavior. ML gets smarter over time as it learns from your firm's data.

- **Risks:** Can produce biased or inconsistent results if trained on poor-quality data. It often lacks transparency in why it makes certain decisions.

3 **Generative AI:** Used for drafting emails, intake responses, document outlines, and more.

- **Benefits:** Saves time on first drafts and administrative work. It can help staff respond quickly to clients or prep documents faster.

- **Risks:** Can "hallucinate" (make up facts) or cite non-existent cases. It always requires human review to ensure accuracy and compliance.

Is the AI explainable and auditable?

Legal work requires accountability. If the answers to any of the following questions are unclear, the risk may be too high for your firm. You need to know:

- Can you review or retrace the logic behind an AI recommendation or output?
- Are there logs or reports available that show how decisions were made?
- Does the AI assist or override human judgment?

Are there safeguards against hallucinations?

Generative AI can sometimes make up facts. Your vendor should have built-in safeguards to catch or flag inaccurate outputs before they reach your clients or the courtroom.

When talking with legal tech vendors, ask them:

- Are there automatic prompts for a human to verify the accuracy of generative AI outputs? (These are called human-in-the-loop reviews)
- Are there limits on what AI can auto-generate?
- How are users notified of potential inaccuracies?

What's the vendor's stance on data privacy and training models?

Some vendors use client data to train AI models, and others don't. You deserve full transparency. Ask vendors:

- Is my firm's data used to improve or train AI models? If so, can I opt out?
- How is sensitive or privileged information protected?

Does the AI improve real workflows or is it just hype?

At the end of the day, AI should make your work easier, faster, or more accurate. Look for tools that solve real problems in areas like:

- Timekeeping and billing
- Document management
- Client intake and follow-up
- Communication and email handling
- Task and workflow automation

If you can't tie the AI back to real efficiencies or outcomes, it may not be worth the added complexity.

How To Choose a Legal Software Vendor

After you understand your stakeholders' needs, it's time to evaluate what exists in the market. Many law firms are wooed by the bells and whistles of the latest software. But it's critical to invest in only the features that are meaningful to your firm. Referring to the goals your team set will keep your decision-making process on track.

Here's a tried-and-true process that will help you make the best choice the first time.

DEFINE YOUR SELECTION CRITERIA

Start building your list of requirements for the software. An easy way to begin is to list every possiblefeature, functionality, and security measure your firm needs. Here's a list to get you started. To probe further, please see the Appendix for a list of questions to ask to make sure you get what you need from your legal practice management software.

● Timekeeping

Legal software should take the headaches out of timekeeping. That means any timekeeping solution should be intuitive and easy to use.

Evaluate whether the new system meets your rounding requirements, whether that's billing in quarter hour or tenth of an hour increments.

● Billing and Reporting

How you bill your clients may dictate whether a client wants to retain you from the start. The software you choose must accommodate your clients' preferences. Meeting clients where they are improves the client experience and raises the chance that you'll be paid on time.

The more complex your billing needs, the more advanced and granular your software needs to be. If you need to generate flat fee bills and statements, complete trust accounting, and perform trust replenishments, you'll need to consider additional key accounting details when evaluating legal practice management software.

● Accounting

When you're evaluating a software's accounting system, determine whether you want integrated accounting or a system that can integrate with QuickBooks.

Fully integrated accounting strengthens your efficiency and prevents common mistakes that occur as a byproduct of inputting manual entries into multiple systems. If your system is fully integrated, consider whether you use cash-based or accrual-based accounting.

● Calendaring

Few things are more critical to your firm's day-to-day operations than an accurate calendar. Practice management software gives you a centralized calendar that is backed up and allows you to choose from multiple views and a matter-centric view. You can even create workflows and automated tasks built into each calendar view.

● Task Management

Task management tools make it easy for managing attorneys to check the progress of their cases. Attorneys and staff should be able to use the system to see where any case stands at any given point in time.

● Document and Email Management

Document and email management tools help law firms organize, store, and manage legal documents and information.

● Workflow automation

Finding tools that automate workflows, freeing up more time to bill or perform higher-level work, is essential to growing your practice.

Think of your client intake workflow. Many of the routine components, like creating a client record, sending emails, and creating tasks for firm staff, can be automated with the right technology.

Communication tools and portals

External communication tools are as important as internal collaboration features. Client portals have become a standard feature that prospective clients expect. What is your client service like now? Does your team lose billable hours answering questions that could easily be answered through a client portal? Do you give your clients the autonomy to pull the answers they need on their own, or do they still rely on contacting you? To improve client communication and create a client-centric approach to your day-to-day tasks, prioritize file storage and data security to promote a seamless, positive experience that clients will recommend to others.

Client intake process

Another make-or-break process for client satisfaction is the intake process. At its core, you need to be able to track data efficiently and access it whenever you need it from wherever you are.

Your practice management software should help facilitate:

- Collecting the potential new client's details
- Screening the prospect and conducting a conflict check
- Consulting with the prospect
- Sending a new client agreement
- Gathering necessary documents

Scalability

A forward-thinking law firm should assess a software solution's scalability to determine its ability to grow alongside the firm. The selected technology should be flexible and capable of accommodating the firm's expanding client base and evolving needs. Scalability ensures that the software remains efficient and effective as the firm expands its services and client engagements.

Integration capabilities

Integration with existing systems and software is paramount for seamless workflow and data management. A compatible software solution eliminates silos by allowing different tools to communicate effectively. When evaluating vendors, prioritize solutions that offer robust integration capabilities. This ensures that the new software can work harmoniously with the firm's current tools, enhancing overall productivity and reducing the employee learning curve.

● Data privacy and security

Protecting sensitive client data is a top priority for law firms. At a minimum, the vendor should ensure that data is encrypted both in transit and at rest to prevent unauthorized access. The vendor should also verify the availability of robust access controls, allowing you to manage who can access specific data within the software. Finally, confirm that the software complies with legal regulations such as GDPR, HIPAA, or other relevant industry standards.

● Disaster recovery and business continuity

A reliable software vendor should have a robust disaster recovery and business continuity plan.

● Training and support

Comprehensive training and support are essential for effective software implementation and usage. Assess the vendor's training programs, including on-site training, webinars, and user manuals, to ensure staff members can effectively use the software. Review the vendor's support services, including response times and availability.

● Reputation and track record

A vendor with a strong reputation and a proven track record is more likely to deliver reliable, high-quality services. Seek recommendations from trusted sources, such as other law firms or legal professionals. Additionally, review case studies, client testimonials, and online reviews to gauge the vendor's performance and client satisfaction levels.

External feedback can also be helpful. Read customer reviews on sites like Capterra and G2; many reviews will mention shortcomings. Additionally, if you're part of the Association of Legal Administrators or a similar professional community, ask your network questions, such as what they wish they had asked or known before buying new legal software.

CREATE A SHORT LIST

Create a short list of vendors that will receive a detailed request for proposal (RFP). Your RFP should outline your firm's needs and expectations.

Once vendors respond to your RFP, set up demonstrations to assess the software's usability, interface, and functionality firsthand. Verify the solution's security measures, including data encryption, access controls, and compliance with legal regulations.

After demonstrations, conduct a rigorous reference check. Speak with past and current clients to get insights into the vendor's reliability, customer service, and effectiveness.

Carefully review each vendor's contract, terms of service, and service level agreements. Clarify any terms related to support, updates, data security, and termination policies.

Finally, score the proposals you receive based on your defined criteria. An objective points system can help you choose the most suitable vendor.

MAKE THE FINAL DECISION

Run a pilot test of the top-scoring solution with a small team. Gather user feedback regarding functionality and performance on specific use cases. Consider the solution's ease of use and intuitiveness.

Then conduct a detailed cost-benefit analysis considering the initial investment, ongoing costs, and the expected benefits in terms of time savings, efficiency, and client satisfaction.

If all goes well, it's time to implement your chosen solution.

How To Implement New Legal Software

A smooth implementation is critical to ensuring user acceptance of the software. Perhaps no aspect of implementation is more critical than internal and external communication.

To facilitate communication, designate a project manager to oversee the implementation process. This person should be the point of contact between the firm and the vendor. The project manager should also set a timetable to ensure the project stays on track.

Your practice management software should help facilitate:

- What is the implementation timeline? Are there specific milestones to track progress?

- How will you handle delays or issues during implementation?

- Is a dedicated support team or account manager assigned to the law firm?

- What level of support will be provided during implementation?

- What are the response times for support queries?

- What training resources are available, and how will training sessions be conducted?

- Are user manuals, FAQs, or online resources available for ongoing user support?

- What is the integration plan with existing systems, and how will data migration be managed?

- What precautions prevent data loss or corruption during migration?

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ONE CAVEAT

Vendors may make a wide range of promises regarding implementation, but what they will do for you may be more limited. You need to understand the different levels of detail offered with each implementation stage to determine what's best for your firm.

IMPLEMENTATION STAGES

The project manager should lead the firm through four stages of implementation: data migration, setup and configuration, testing, and training. Here's what to expect.

● Stage 1: Data Migration

What it is

- The process of moving your data from your previous software to your new software.

- This can include everything from client data, calendars, and documents to billing and accounting data.

Your role

- Ensure your data is clean and organized before transferring it into the new software.

Considerations

- Free, basic data migrations don't include custom fields or billing data. You'll be missing information and will need to clean up some data.

- Advanced conversions will include client information, billed time entries, billed expense entries, bills, payments, credits, and trust transactions.

● Stage 2: Setup and configuration

What it is

- The process of customizing the software to meet your firm's needs.

Your role

- Develop an integration plan if the new software must mesh with your existing systems.

- Check whether the existing and new software have compatible APIs for seamless communication.

- If not, work with a developer to create connectors or middleware tailored to your firm's needs.

- Identify what capabilities you need right away and what can wait to be customized later.

Considerations

- Costs will depend on the degree of customization needed.

- Ask if the software allows in-depth customization or a static offering.

- If you need to save money upfront, you can always configure the software gradually.

● Stage 3: Testing

What it is

- The process of testing the software's functionality and identifying glitches.

Your role

- Ensure all security protocols are in place, including access controls and encryption.

- Conduct user acceptance testing to validate the software's functionality.

Considerations

- Make sure the software behaves as intended and is fit for use before it goes live to the entire firm.

● Stage 4: Training

What it is

- Ongoing education that bridges the gap between the promise of useful new software and the reality of its successful integration.

Your role

- Be prepared to address resistance to change.

- Educate staff about the software switch, emphasizing its benefits to gain buy-in.

- Foster a mindset that training is part of a holistic project that sets the firm up for success on the new system.

Considerations

- Free training is usually basic and limited to one trainer's availability. It could also be limited to recorded training videos with no interactive Q&A opportunities.

STEP 5

Maximize Your Tech ROI and Adoption

Set your team up for success in the new software system with a training program that incorporates these key elements. Doing so will help you maximize your technology investment.

● Leadership buy-in

Firm leaders can determine overall success of the software's adoption and usage by setting expectations early on. They should advocate for training so that the goals for what the software will achieve are communicated at the outset.

● The right training style

Instructor-led training and group discussion are both ideal types of training. The length of the training should be optimized for information retention. Break your training into bite-sized sessions and avoid trying to teach everything all at once.

● Relevance of information

Maximize engagement in your training program by providing material relevant to each person's role and responsibilities. Use your firm's data in the sessions to keep your training relevant. This combats the foreign nature of the new software with the familiarity of known data, and boosts users' ability to grasp the concepts quickly.

● Reinforcement

Reinforcing your training ensures everyone uses the software correctly, avoids bad habits, and maximizes the potential of your investment. Host weekly Q&A sessions or provide a resource library with videos and guides to give your team more ways to learn. Review best practices regularly and focus supplemental sessions on specific questions to improve adoption and reduce user error.

Moving Forward with New Software

The goal is for your new software to optimize your law firm so you can take better care of your clients, experience growth, and remain successful. The only way to achieve these goals is to select software that will help your team reach its objectives as efficiently and successfully as possible.

The process may seem tedious, but if you approach the journey strategically and ask the right questions, your hard work will pay off with a meaningful upgrade to how your firm conducts its business.

As our industry continues to evolve, embracing technology is essential to remain efficient, competitive, and client-centric. We hope this guide empowers you to make more informed decisions when adopting new software. Remember that selecting the right technology solutions for your law firm isn't just an investment in software — it's also an investment in the future of your practice.

Appendix

Questions to Define Your Selection Criteria

Defining your firm's precise selection criteria is critical to ensure the new software meets your needs. Consider asking these questions of your firm and software vendors to ensure you make the best choice.

Timekeeping questions

- Do you need to run timers?

- Do you hold time entries that you won't bill to your client for a particular period?

- Do your timekeepers want time to be automatically captured for them?

- Do you need to merge time entries?

- Do you need to set up rates on a client or matter basis?

- How often do you update rates? Find out whether the vendor requires you to manually update rate changes or whether you can set effective dates on your rate tables.

- Do your timekeepers want mobile access to the system?

- Do your timekeepers work heavily in Outlook or Word? Would it benefit them to create billing entries directly from those two programs?

Billing questions

- How do you take payments?

- Do you need to manually enter and allocate payments?

- Do you send bills by email?

- Do you process credit card payments?

- Do you add convenience fees for card payments?

- Do you accept payment by ACH?

- Do you charge interest?

- Do you bill hourly? Do you use flat fees? Do you allocate parts of a flat fee to each timekeeper that worked on the matter?

- Do you use contingency fees?

- If your firm uses e-billing, the payment processor will cut back the number of your bills. Is it important to allocate payments or credits to your different timekeepers based on adjustments made to those electronic bills?

- Do you use split billing?

- How do you allocate your splits? Is it 50/50, or do you have a more complex structure? (If you have one matter with multiple parties paying for the work, your software must accommodate this.)

- Do you use LEDES billing? If so, do you use a template that requires your bills to be in a specific format?

- Do you use different sets of billing codes?

Reporting Questions

- What kind of out-of-the-box reports do you have?

- Do you offer a custom report builder?

- Does your system produce compensation reports for originators or working timekeepers?

Accounting questions

- How can I set up a chart of accounts?

- What does the balance sheet report look like?

- Can your solution do comparative or segmented reporting?

- Can we enter payables?

- What formats and layouts are available for checks?

- Can we write checks from multiple accounts?

- Can we have multiple operating and IOLTA accounts?

- How does the software handle 1099s?

- Does the system keep your trust accounts and client liabilities in balance?

- Does the system remind us to make transfers between the operating and trust accounts?

- Do accounts receivable always balance back to our billing system?

Calendaring questions

- What does the software's calendar look like?

- Will the software accommodate our calendaring process?

- Does the software integrate with our other platforms (e.g., Outlook or Google Calendar)? How does the sync work?

- Can we calendar deadlines in the software?

- Can we create chain calendar events? For example, if we have a trial on June 1, will we automatically receive a notification five days earlier regarding the tasks we need to complete in advance?

- Does the software offer adequate filters and views?

Task management questions

- Can attorneys see at a glance what tasks have been completed and are pending on a matter?

- Can tasks be categorized and prioritized?

- How does the system send reminders about tasks?

- Does the system allow file attachments or comments for each task?

- Can tasks be assigned to multiple team members?

Document management questions

- What is your preferred way to organize documents?

- Do you want the system to categorize and assign metadata tags to your documents?

- Do you want users to choose how to save their documents or a system that forces them to save them a certain way?

- Do you need to search for documents?

- Do you need to keep track of document versions?

- Do you need to share documents among team members?

- Would you like to create template documents in Microsoft Word?

- Would you like the software to automatically populate forms that you use repeatedly?

- How much storage do you need? How big is your drive now? Does the vendor offer unlimited storage?

Email management questions

- Does the system let you save emails directly from Outlook or Gmail? How easy is it to do so?

- How does the system store saved emails?

- Does it make copies of emails, link to them, or convert them?

Workflow automation questions

- How easy is it to create and customize workflows within the software?

- Does the software have a user-friendly drag-and-drop interface for building workflows?

- Can the workflow automation integrate with our other software and systems?

- Is there API support for connecting the workflow automation to external applications?

- Can the workflow assign tasks automatically to team members based on predefined criteria?

- Are customizable notifications and reminders available to alert users about pending tasks or approaching deadlines?

- Is there support for creating digital forms and collecting data within workflows?

- Can the software capture and store data from form submissions for future reference and analysis?

- What triggers can initiate workflows? (e.g., client input, document submission, or dates)?

Communication portal questions

- What features are available in the client self-service portal?

- Is the portal accessible via smartphones and tablets?

- Can clients upload documents, complete forms, or schedule appointments through the portal?

- What security measures protect client data in the portal?

- Does your portal offer real-time notifications for case updates, appointments, or document uploads?

- Can clients communicate with their attorney or support staff directly through the portal?

- Does the portal have a knowledge base or FAQs to help clients find answers to common questions?

Client intake workflow questions

- Does the system offer customizable intake forms tailored to different practice areas?

- Can the intake system automatically capture and store client information?

- Is the intake process automated, allowing clients to fill out forms online without manual data entry?

- Does the system have conditional logic, enabling dynamic form fields based on client responses?

- Can we integrate the intake system with our website or social media for seamless lead capture?

- Do you allow e-signatures for signing of engagement letters and consent forms?

- How does your system track leads?

- Does your system automate workflows for follow-up tasks and notifications after a prospect submits an intake form?

Scalability questions

- What is the maximum number of users and cases the software can handle effectively?

- How easily can the system be upgraded or expanded to meet the growing needs of our law firm?

- How have you worked with other clients to accommodate their growth?

Data privacy and security questions

- What encryption methods do you use to protect data in transit and at rest?

- Where is our data stored?

- What physical measures are used at the storage facilities?

- How are user access and permissions managed in the software to prevent unauthorized access to client data?

- What data privacy certifications and compliances does your company have?

- What is your protocol in case of a security breach?

- What measures are in place to prevent data loss or theft?

Disaster recovery questions

- How frequently is data backed up?

- Where are backups stored?

- Is there redundancy in backup locations?

- What is the vendor's timeline for recovering data in case of a disaster, and how much data loss is acceptable?

- Does the system have failover mechanisms and redundant servers to ensure continuous service even in case of server failures?

Training and support questions

- Do you offer 24/7 support?

- What channels are available for reaching the help desk?

- Is there a dedicated help desk for urgent matters?

- Do you roll out upgrades and updates automatically? If not, what is the process for updating the software?

- How disruptive are these updates to daily operations?

- What are your troubleshooting protocols?

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