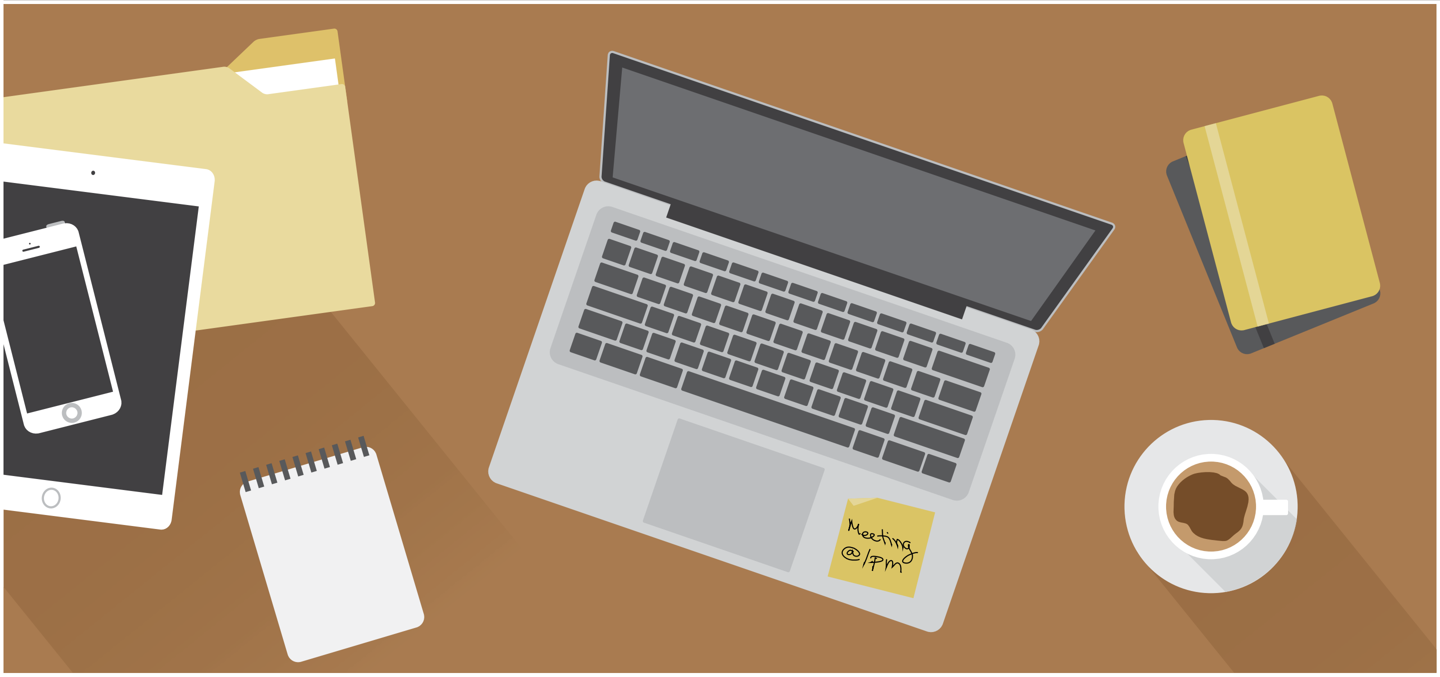
9 Questions to Consider Before Buying Legal Technology



A successful business is consistently evaluating their achievements and measuring their performance. Do you know the answers to your law firm's most important questions?

1. *How many cases did you successfully process last year?*
2. *How profitable was the firm last year?*
3. *Is your contact list current and accurate?*
4. *What are your most successful referral sources?*

If you're struggling to pin down answers to these questions, you're not alone, but it's time to consider a legal practice management system (or replace one that's just not cutting it).

Whether you're a solo lawyer without a law firm CRM in place or a BigLaw firm looking to make the switch to something new, here are the 9 questions to ask before choosing a legal practice management system.

1. What kind of features do you need? Which features can you live without?

Before you begin your search, take a moment to consider and write down all of the legal technology features that are most important for you and your firm. Do you need calendaring? Accounting? What about in-system messaging? Write it all down. With your list in-hand, you'll be far more prepared to speak with potential vendors about their offering.

Generally, you can find an overview of features online, but it's best to speak directly with the vendor to see if they offer any specialized or customizable features per firm or law type. Be prepared to explain your business goals to potential vendors and to share any relevant information that will help them understand your law firm's needs.

It's important to be aware of vendors who rely on endless integrations, especially when it comes to the core features of the system: *whichever vendor you choose should be able to provide a full suite of products that fit your firm's needs without relying on plugins and integrations that require additional subscriptions.*

Additionally, though it's important to know what your firm's specific needs are, it's also important to recognize that there will be some limitations that come with choosing a case management system. Some limitations aren't necessarily bad, but it is important to be clear on what those limitations are before you make a final decision.

Remember, the sign of a good vendor is that they'll truly take the time to get to know you and your business, discuss your pain points, and demonstrate how their product can provide a solution for *your* firm.

2. Is it easy to access?

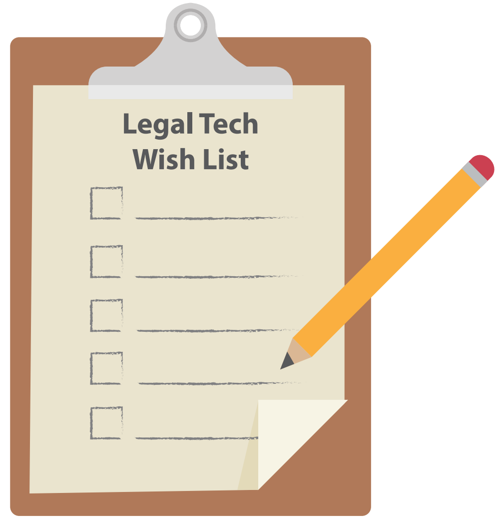
It's a tech-centric workforce out there, so accessibility from all devices is a must. Any legal practice management software that you're considering should be easy to access from your desktop, mobile, and any other device you may have.

Keep in mind, however, that a designated mobile App isn't necessary, but mobile responsiveness is a priority. For example, at MerusCase, we chose not to over-engineer and create a downloadable App. Instead, we took a mobile-first approach and designed our product to be mobile-friendly from the ground up, which provides you access to the full suite of MerusCase features from any device with internet access.

3. How is the software implemented and how long does it take?

Find out how the process of getting started with your new vendor works. How is all of your data transferred into their product? Is this something that needs to be done from your end, or does the vendor provide support during this process? How much does it cost and how long does the process take? These are all great question to ask as you start to narrow down different options.

Be on the lookout for white-glove onboarding options, meaning the vendor should provide full data migration services as well as in-person or online training options with an actual human. No one wants to be stuck figuring out how to use a new technology product *and* go through the hassle of transferring their data all on their own. Your vendor should understand this and know how to make your move as simple as possible.



4. Is support provided? Does it cost extra?

After the software has been implemented, your vendor should understand that the hard work isn't over—in fact, it's just begun!

Once your firm is up and running, a great legal tech vendor won't just leave you stranded: they'll work with you to make sure your firm's employees are brought up to speed as quickly as possible, minimizing lost productivity. That said, if a vendor doesn't provide training or ongoing support, it's time to say "thanks, but no thanks" and move on as quickly as possible. No training or bad training can cost your firm thousands of dollars in lost time and leave your business worse off than it was before the software was implemented.

Things to look for? In-person trainings, round-the-clock support via email and phone, product documentation, and other resources that will help your firm use the product in a way that's truly beneficial.

5. Is the software and your data secure?

Whether you're considering a cloud-based or server-based system, make sure you're aware of the system's security measures and compliance with HIPAA policies.

Here at MerusCase, we're serious about security, and your legal practice management provider should be, too! We implement SSL security encryption as well as database encryption to ensure that your data is safe while keeping

everything in regulation with HIPAA. MerusCase also provides an option for HIPAA-compliant secure messages to keep your clients' protected information secure. Pretty sweet, right?

6. Exactly how much is it going to cost? Will they raise the prices on you after the first year?

Even if you *are* looking for a new way to manage your firm, you most likely don't want to drain your budget to make it happen. Discuss pricing options with your vendor and don't forget to consider how the length of subscription or size of your firm might affect these options. What happens if you need to add additional users? What if you need to delete users? Do they charge for data storage or for having a large number of contacts? Will premium features cost you extra? Are discounts offered for annual licensing?

Know exactly how the pricing structure of a product works before you lock yourself into a commitment, and be prepared to quantify how the return on investment of legal technology will benefit your firm.

7. Is it scalable?

If your firm is focused on growth, it's time to ask yourself, will your case management system grow with your firm, or will you eventually reach a bottleneck that stops you in your tracks?

This is the time to ask all of those nagging "what if" questions that have been looming in the back of your mind. Inquire about what kind of firms the vendor provides for; are they mostly solo or do they have the capacity to handle BigLaw as well? Will you need to pay for large amounts of data storage? Do they cap the number of contacts or documents you can track through the system?

A great law firm CRM should provide unlimited data, unlimited contacts, and unlimited licensing to easily allow your firm to grow and expand without becoming cost prohibitive.

8. Is the company reputable?

Don't hesitate to question potential vendors about their users: how many do they have? In which states? What practice areas do they serve? If you really want to go the extra mile, you can even ask the vendor to connect you with a client whose firm is similar to yours. This way, you can really get the inside scoop from someone who's had the chance to dig their heels into the product and can give you honest feedback on which features they like and dislike.

Additionally, be sure not to ignore the vendor's online presence (or lack thereof). Do some research to see if there are any reviews about the company, check out their social media channels to see if people have left any comments, concerns, or reviews in general, as well as if and *how* the company responds. *Buyer beware: if a tech company is lacking a healthy digital presence… Well, you might just want to reconsider.*

9. Does the company offer a free trial or demo?

You've done your due dilligence and you've asked your questions… The last thing you need to do? Test out the product before you buy it! Be sure to ask for a free trial that will allow you to click around for yourself and decide if the practice management system is actually something you can make use of. Many vendors offer demos, so take advantage of that option and get the grand tour before making your final decision.

Thank you for reading!

Looking for more resources? Check out our How to Go Paperless white paper!

What if, in a mountain full of paper, you could rise to the top?

Everyone dreams of it: a pristine workspace where everything is organized and devoid of clutter. Chances are, however, your law office is drowning in a sea of files and forms. If you're just starting out, this may not seem like something that needs your attention but, trust us, those papers add up quickly!

Download our free How to Go Paperless white paper, which contains 13 informative and beautifully-designed pages that will help you transform your office in 10 simple steps.

Download Now!

About MerusCase

MerusCase is the only comprehensive, cloud-based legal practice management system trusted by thousands of lawyers to manage their cases, documents, calendar, email, billing, and beyond. Be brilliant. Be MerusCase. Learn more at meruscase.com!