

BUYER'S GUIDE TO LEGAL TECHNOLOGY

Technology continues to transform how cases and practices are managed, simplifying many processes and increasing efficiency. The right technology delivers greater efficiency to attorneys and higher client satisfaction while balancing the budget and daily needs of the firm. Make sure you have all the information you need to make the right decision.

HISTORY

In 2015, Software Advice, an online software review site, released a [study](#) of legal tech users stating that 88% of law firms saw a positive impact on case-file organization, 85% saw an improvement in workflow process, and 79% saw an increase in billable hours when they implemented legal technology. There are a multitude of options for attorneys, but to choose which software program is best for a firm, there are several factors that must be taken into account. Questions to consider when making that decision include:

- Functionality
 - Invoicing and payment options
 - Payment processing
 - Document management
 - Calendar tools
 - Client access
- Costs
- Ease of use
- Continuous improvement

Before you begin scouring various offerings, figure out what features your firm actually needs. By coming up with a needs list you can identify the 'must-haves' from the 'nice to have's', saving you time and money. Looking at trends will give you a better idea of where technology trends and innovations are heading, which will help you make an informed decision not just for today, but for tomorrow.



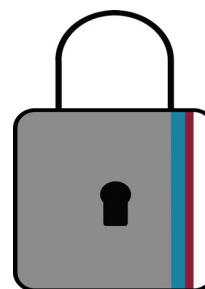
KEY FEATURES

EFFICIENCY IMPROVEMENT TOOLS

DOCUMENT MANAGEMENT

Nearly all forms and 'paperwork' are completed on a computer. It should be easy to store, refer to, and access them in any way you choose through your legal software.

Look for a software solution that safely accesses your stored files without saving them in the software itself. Some of the most popular products available today store your files in the system but can make it difficult to move and modify them. The key benefit for document management is to ensure you have control over where and how documents are stored and accessed, not held hostage in a system.



79%
SAW AN INCREASE IN
BILLABLE HOURS

85%
SAW IMPROVEMENTS IN
WORKFLOW PROCESS

88%
SAW POSITIVE
IMPACTS OF CASE-FILE
ORGANIZATION

INVOICING

One of the key benefits potential new clients look for when selecting an attorney is flexible billing. Many clients look for attorneys who offer a flat rate. Other cases require an hourly rate or use a contingency model. When reviewing systems, make sure to look for software that lets you determine your billing method on a case by case basis.



*LOOK FOR A PLATFORM THAT
VIEWS DOCUMENTS, BUT
DOESN'T HOLD THEM HOSTAGE.
THE RIGHT SOFTWARE GIVES
YOU FULL CONTROL OVER YOUR
DOCUMENTS, AT ANY TIME*

PAYMENT PROCESSING

While managing cases and clients take the majority of your working time, managing payments shouldn't. Look for systems that allow you to track payments against invoices, adjust those payments and invoices, and automate the accounts receivable process.

CALENDAR TOOLS

So much time is spent setting up appointments, calls, and meetings. Software can simplify the process by offering the client the ability to book their meetings directly into the attorney's schedule. Legal technology should support the attorney and the client. Look for a system with a private, secure, client portal.



*MAKE SURE THE SOFTWARE
PROVIDES FLEXIBLE BILLING
OPTIONS, INCLUDING FIXED
RATE, HOURLY RATE, AND
CONTINGENCY BILLING*

CLIENT ACCESS

for a platform that gives the client a secure, private portal to see the documentation, notes, scheduled meetings, court dates and more. The client will be informed, can provide additional documentation, and answer any questions right through the portal to improve case efficiency.



SECURITY

Regardless of the functional tools, the software you select must protect all of the data. Look for multiple security tools, including protection from malware, viruses, and phishing attacks, and a high level of encryption to protect data as it travels across internet connections.

EASE OF USE

Take advantage of free trial periods. There is no substitute for actually using the software, even if under a test case, to be certain that adoption of the platform goes smoothly. Look for a provider that offers free on-boarding and online tools to support adoption. The provider you select should listen to their clients feedback and actually implement it, too.

CONTINUOUS IMPROVEMENT

Look for providers that are committed to remaining current on the latest technology capabilities. Check on recent software updates that go beyond the standard bug fixes to actual improvement of software capability. If the latest version of the software hasn't been upgraded in the past 12 months, it is probably best to move on.

BUDGET

There are countless solutions but the most appealing ones tend to come with higher costs. The reality is you likely need a core set of capabilities to improve efficiency and enhance client satisfaction. The rest are nice to have but may not be used as regularly and can increase your spend. Search for a platform that balances true needs and budget.

TIME MANAGEMENT

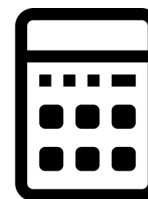
According to a [survey](#) conducted by Software Advice, 68% of legal practices take advantage of the time management features that many software programs offer. Some programs offer time tracking, enabling attorneys to track and record "billable time" automatically. Calendaring, which assists in viewing deadlines, tasks, and appointments is another great tool to help with time management.

FINANCE MANAGEMENT

A key feature of legal software is that it should have the function of billing and finance management. Users can create reports on financial transactions and, on a large scale, can readily assist with the individual performance of attorneys.



SECURITY TOOLS SHOULD PROTECT YOU FROM MALWARE, VIRUSES AND PHISHING ATTACKS



COMPARE COST VERSUS NEED- MANY PLATFORMS OFFER SOME GREAT FUNCTIONALITY BUT MAKE SURE YOU WILL ACTUALLY USE IT



LEGAL SOFTWARE SHOULD HELP MANAGE FINANCIAL TRANSACTIONS



SOFTWARE ACCESS

There are three software deployment methods companies use to release their programs: on-premise installations, cloud-based software, and web applications.

On-premise installation may be the most traditional method. Software is downloaded directly to a firm's server or a computer. Although it has been commonly used, there are very little benefits to on-premise installation: installation requirements, maintenance and security of the software and hardware, and a manual process when software upgrades are required.

Cloud-based solutions are accessed via the internet and typically provide some level of customization, from fonts and logos to workflows. Since the software is hosted via the internet, it is always up to date when automatic updates are turned on and users do not need to invest in installation or upgrade costs. With cloud-based programs, users can easily access their information using secure log-ins through any computer.

Web applications are similar to cloud-based but have limited customization options. They usually store data on the used device, rather than on the cloud. Upgrades are offered via web browsers and there are typically no upgrade costs.

Generally speaking, cloud-based software is the optimal choice, as it frees up any individual computer resources and can be accessed via any authorized device.

INTEGRATION AND ADAPTABILITY

The successful integration of a software program into a firm's existing technology is vital in order to ensure it is adopted. If the software you select needs to interact with existing resources, make sure the two systems are compatible with each other. If at all possible, select a software system that gives you all the functionality you need in one platform.

The adaptability of the software ensures the changing needs of a law firm can be actively addressed. Verify that the software is capable of accommodating multiple users across cases and managing multiple cases at once. Look for features that allow various levels of data access to ensure the privacy of your clients while allowing support staff access to data they may need.



ON-PREMISE

*KNOW ANY SOFTWARE
MAINTENANCE REQUIREMENTS
MANUAL INSTALLATION
& UPGRADES*



CLOUD-BASED

*HOSTED ON INTERNET
AUTOMATIC UPDATES
NO UPGRADE COSTS*



WEB APPLICATIONS

*UPGRADES VIA WEB
NO UPGRADE COSTS*



*MAKE SURE YOUR SOFTWARE
IS COMPATIBLE WITH OTHER
SOFTWARE YOU USE, LIKE EMAIL
OR CALENDARS*

SECURITY

Reiterating the importance of security, make sure the software you select offers state-of-the-art data security. Firewalls, encryption, password complexity, and other tools are a requirement to protect all case and practice data. Look for providers that regularly monitor and adjust their software for the latest in security trends. For more information on cybersecurity, download our white paper.

HOW TO SEARCH FOR LEGAL SOFTWARE ONLINE REVIEW RESOURCES

Similar to how clients search for attorneys, firms have the option of searching for software programs through social media. There are a multitude of websites including G2Crowd and Capterra that allow attorneys and firms to review and compare programs that offer the key functionalities that benefit them. These websites showcase software ratings, prices, methods of deployment, platforms, the business size that they are compatible with, and company and client reviews.

The American Bar Association provides an online review site to help you compare and contrast specific legal technology options. From there, you can find information regarding specific functionality, pricing, installation, and more. Additionally, if you are a member of the APA, you may qualify for a discount.

CLIENT PERSPECTIVE

When searching for reliable software programs, it is vital to consider clients and their needs. Software should offer clients online real-time views of their cases, documents, status, and tools like requesting meetings online. Clients should feel empowered and informed as they often leave reviews on websites such as Yelp and Google Reviews. A happy client is a returning client and someone who will refer others to the attorney as well.

BOOK A DEMO

Before taking the leap of faith when deciding on a legal software program, it is important to book a demo first. As most demos are free, you should run demos with all viable options to see which works best for you. You can typically book demos directly through the software website, and several programs have multiple ways to connect to their interface in order to receive a demo and or ask questions about the software.



*LOOK AT TRUSTED SITES FOR
ONLINE REVIEWS OF VARIOUS
PLATFORMS*



*LOOK FOR SOFTWARE THAT
OFFERS A FREE TRIAL PERIOD*



HIRE A TECH CONSULTANT

A tech consultant who is familiar with law practice management software can be a great resource to help you select a software. A good consultant will help you with your business model, the different types of software, evaluating security needs, and determining what price is best for you. However, keep in mind that a tech consultant can make money in different ways: a consulting fee, reselling commissions through vendors, and through different contracts. A consultant will find the best solutions for you but you need to have a conversation about what their incentives are before they help you.

SUMMARY

Technology is transforming industries everywhere you look. From maps to weather to music, technology is helping people find what they need, at the click of a button. The same should be true for attorneys and clients. While there are many options out there, the key is balancing the true needs of the firm with budget. Make sure to spend time identifying what your firm truly needs to deliver efficiency of time and expense.



*LEGAL TECHNOLOGY SHOULD
BE EASY-TO-USE, SECURE, AND
SUPPORT BOTH THE ATTORNEY
AND THE CLIENT*

