

## How to choose the right software for your law firm

Choosing the right software for your law firm is a business-critical decision, but it can be hard to know where to start. With the benefits of expertise and proper research, the right choice will lead to efficiency, productivity and profitability.

This checklist should be used as a working document, and provides a practical guide for law firm decision makers embarking on the journey of reviewing their current software, assessing their options, and making a successful move.

Strategic Partner



The Law Society



### Planning to leave your existing supplier

Before embarking upon a potential move, it is sensible to understand what is involved in moving away from your current supplier. There may be data transfer questions, timescale implications and financial penalties to consider.

	Notes
<p><b>What is the status of your current contract, and how much notice do you have to give?</b></p> <p>Don't assume that 30 days' notice is enough – many contracts require 3 months, 6 months, or even longer. Missing your notice deadline can tie you in for a further 1-3 years, or facing financial penalties.</p>	
<p><b>How can you move your data?</b></p> <p>Most software suppliers offer data migration services, but they can vary significantly in nature and also in price. Firstly, you need to ensure that your data is accessible, either to back up or download yourself, or by requesting it from your supplier. Secondly, make sure that your new supplier confirms what will be included, what will not be migrated, and what may change. Make sure they detail the process, any downtime, and how many trials are included (if any).</p>	
<p><b>How much will it cost to migrate?</b></p> <p>Most firms will think to ask their new supplier how much it will cost to migrate their data, but many don't realise that some suppliers also charge you to leave. Check this with your current and future suppliers. If you are reliant on your supplier to provide your data back to you, check how often they will do this and whether there is an additional charge for this.</p>	
<p><b>What happens to your data after you've left?</b></p> <p>What happens to any remaining data left on computer servers or in the cloud? GDPR regulations place conditions on data owners for the management or disposal of information. You need to ensure it's not kept for too long, but also for long enough to aid a smooth transition.</p>	
<p><b>Have you noted your main reasons for leaving?</b></p> <p>The best way to make sure that you don't fall in to the same situation with your new supplier, is to fully review and understand what you've been unhappy with, or what your current software doesn't provide.</p>	
<p><b>Who will be involved with the move?</b></p> <p>Staff members from your own firm as well as both your old and new suppliers will have their parts to play. Make sure that you have a key contact at your old supplier, a project manager at your new supplier, and your own assembled project team with time allocated time to the work.</p>	

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## Choosing your new supplier

As with any important business decision, choosing a legal IT supplier takes time and planning. You're not just choosing a piece of software, this is a company you'll partner with for many years. Take time to consider exactly what it is you're looking for, then take time to review and appraise the market.

	Notes
<b>List the essential functionality for your firm</b> With input from each department and business function, prepare a simple list of features and their importance. Don't be caught out by making any assumptions that certain features or functions will be included, or aren't a bolt-on application.	
<b>Consider your budget</b> This can be a difficult thing to do, but will be invaluable in avoiding wasting time in considering software that you can't afford. Try not to cut cost unnecessarily. This is an investment, and value is a much more important measure than cost.	
<b>Decide how you would like your software to be deployed</b> Are you looking for a cloud-based solution, or do you want the software to be running from your own server and network? If you choose cloud, is it a true cloud solution, or just hosted on your supplier's servers?	
<b>Ask about the future</b> Question the supplier as to when the software was written and the plans for the future. It's important for your investment that you don't select a product that you will be forced to upgrade from within a short space of time. It's also vital to know that the software will continue to be developed, particularly in the event of legislative or regulatory change.	
<b>Do your research</b> There are many systems on the market and a number of suppliers that you can choose to work with. Resources such as the Legal Software Suppliers Association (LSSA) and the Legal Software Suppliers Guide from the Institute of Legal Finance and Management (ILFM) will give you a head start.	
<b>Understand the pricing</b> Find out what the exact costs are for the software, both now and in the future. Some will charge an upfront purchase cost whilst others are based on monthly fees. Some sign you up to loan or finance agreements. Ascertain what is included and what might be chargeable extras (e.g. software updates, new features and support). Also ask about price rises to ensure you're protected against large or unexpected increases.	
<b>Find out the contract term and any tie-ins or penalties</b> Contract durations for legal software can vary in length, from a rolling monthly contract to a multi-year term. Ensure you are clear about what flexibility you have to add and remove users, along with any cancellation terms. Even if you don't expect to reduce your licence numbers, having the ability to scale is essential in dealing with unforeseen circumstances. Watch out for loans or finance agreements – you'll still be tied to them even if you terminate your software contract.	
<b>Establish what ongoing support is offered</b> Find out if software support is included in your licence fees, or whether it's a chargeable extra. It's also important to know how the support is provided (e.g. a phone line, online chat, email), whether there are caps on usage, and whether it's available to all or just designated users. Also ask about SLAs. For a busy law firm, there is a big difference between a 4-hour and a 24-hour response time!	
<b>Read the reviews</b> Use sources such as Google reviews to see what other law firms are saying about the software and the suppliers. You can also ask the suppliers to provide case studies and reference sites, so you can speak to other firms about their experience.	
<b>Build your shortlist</b> Decide which suppliers you would be happy to work with, then make a list of the software you would like to see a demonstration of.	

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## Arranging product demonstrations

When choosing software, it's essential to see a comprehensive product demonstration. The look and feel of the software is just as important as the list of functionality.

	Notes
<b>Assemble your project team</b> Your software will be used by staff in every role and in every department. It's important not to complicate the process by involving too many people, but it is vital to ensure that all your business functions and finance department are represented.	
<b>Decide how your demos should work</b> Most suppliers will give the option of either an online demo or for a sales-person to visit you. Consider what works best for your firm. An initial online demonstration followed by a more in-depth guided tour can be a useful way to make decisions whilst avoiding any pressure or hard-sell.	
<b>Finalise your essential functionality list</b> Be clear about what your required features are, and ensure they are outlined to your shortlisted providers, ideally before any demo takes place. Any reputable supplier will be honest if there are any requirements that they cannot meet. When it comes to your demonstration, ensure that these points are covered first, so that you can reassure yourselves of the product's suitability.	
<b>Agree your assessment criteria and build a score card</b> When viewing a number of software demonstrations, it can be difficult to remember which features belong to which product. Agree amongst the project team what your criteria are, then make notes as you view the demos and compare scores after.	
<b>Book and carry out the demos</b> Ensure that you allocate appropriate time (be guided by your supplier as to how long this should be) and ensure that you dedicate time away from your day to day responsibilities and distractions. During the demonstrations, don't be afraid to ask questions. A good demo should cover everything that you want to see, not just what the supplier wants to show you!	

## Making the choice

Once you have asked all the pertinent questions and seen the software for yourselves, you can start the decision-making process.

	Notes
<b>Make sure you are comparing like with like</b> Ensure that you are completely clear on the costs, the timescales, and what's included. Ask for a full proposal if it helps you to compare. The devil is in the detail here, so clarity is extremely important. For example, some suppliers start charging once you sign their agreement, whilst others don't start until the software is installed. Differences such as this are important to understand for the overall project costs.	
<b>Don't be afraid to ask more!</b> It is the supplier's job to make sure that you have everything you need to make the right choice. Never be afraid to ask more questions, and never be pressured in to making a decision on the supplier's timescales if you feel they're trying to pressure you to close the deal.	
<b>Ensure the supplier can meet your timescales</b> The migration process, done properly, can sometimes take longer than you think.	
<b>Make the right choice for your firm</b> Your choice of supplier creates a business partnership for years to come.	

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