Cloud-Based Legal Software Selection

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Agenda

- The Challenge
- Identifying Software Needs
- Evaluating Software
- Recommendation

The Challenge

- *Big Money*
- *Assumptions By Sellers*
- *Marketing*
- *Time Is Money*

Legal Tech is Big Money

- More than $1 Billion invested in 2018
- More invested in AI Focused in 2018 than total in 2017
- Fintech – Financial Services - $111.8 Billion invested in 2018
- Lawyers slow on uptake now accepting
- Subscription based
- Legal Technology – search on Google = 2,720,000,000

Assumptions by Sellers

We all do things the same.	And/or they know how we should be doing it.	They can retrain us to do it their way.
We have an abundance of disposable money.	They can save us time.	We like continual, surprise changes.

Marketing

Private Equity

Trained in Sales Not Legal Operations

"Created By Attorneys For Attorneys"

Bar Associations

Time is Money

Identifying Software Needs

➢Firm

➢Staffing

➢Clients
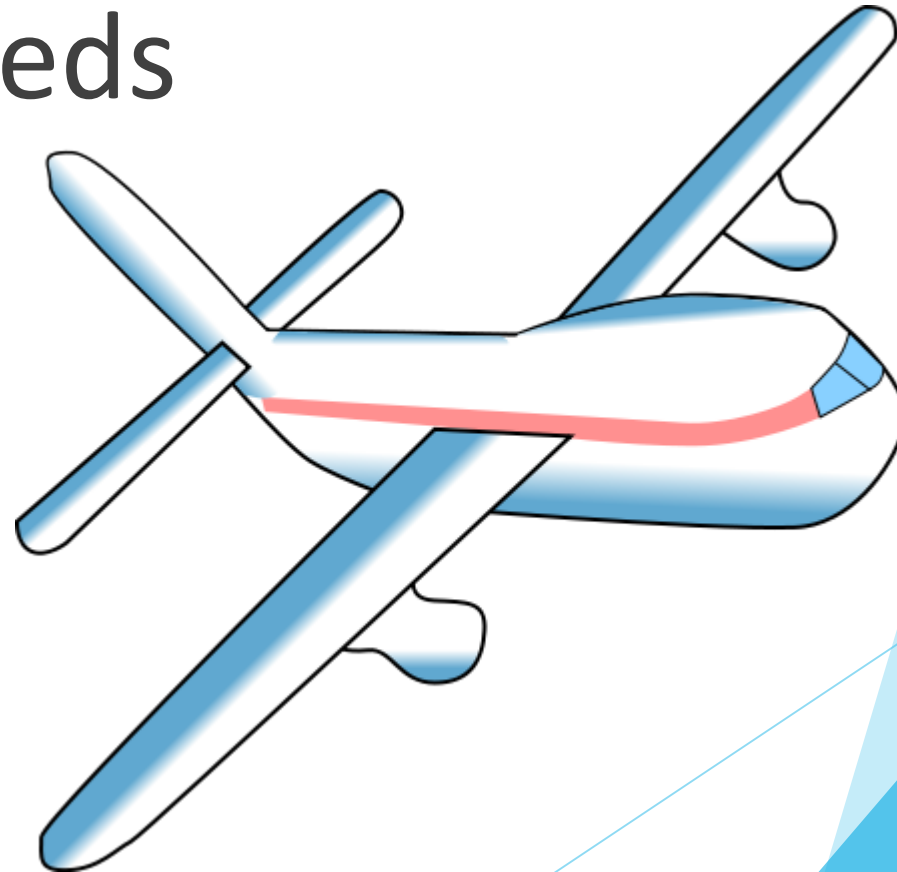
Firm

Dewey, Cheetim & Howe, LLP

- Size
- Age of Attorneys

- Mobility Needs
- Priorities

Staffing

ist.compr.gramsci@gmail.com

How Many?

Billing only?

Tasks

Location of Clients

Type of Client

Age of Clients

Expectation of Clients

What are firm needs?

Why are you looking for software?

Who will use the software?

What security is needed?

How will you use the software with your clients?

Feature List

- Client Intake – sending electronic engagement letters
- HIPPA compliant
- Only Tax Department Will Use
- Mobile Phone Apps
- Integrates with Billing System
- Secure Document Transfer with Clients

Software Spend

Firm History
Percent of Gross
Hourly Cost

Now What?

The List - Features

Features
24/7 User Help
Actions Date Stamped
Depo Transcripts
Doc/Photo viewer
Email Documents from Outlook
Email Photos Directly In
Firm uploads documents
Full Text Search
Handles Video
How long in market
Tags - Firm Create
Mac Integration
Report Customization Ease
Response Time
Scan Directly to Program
Secure sharing outside of firm
SQL
Standard Screens Customizable
Support hours for PST
User groups
Where are Data Centers
Firm adds users/cases
Archived cases different rate

Evaluating Software

- Review Sites
- Colleagues
- Google
- Consultants
- The Demo
- The List

Search for Recommendations

ASK PEERS AND OTHER FIRMS

SEARCH ON GOOGLE

READ LEGAL TECH BLOGS

Review Software Sites and Resources

▶ Check out the sites

▶ YouTube

▶ Check out Help

▶ Target Market

The List – Software To Review

Features	Relativity	Logikcull	Everlaw	Liquid Lit
24/7 User Help				
Actions Date Stamped				
Depo Transcripts				
Doc/Photo viewer				
Email Documents from Outlook				
Email Photos Directly In				
Firm uploads documents				
Full Text Search				
Handles Video				
How long in market				
Tags - Firm Create				
Mac Integration				
Report Customization Ease				
Response Time				
Scan Directly to Program				
Secure sharing outside of firm				
SQL				
Standard Screens Customizable				
Support hours for PST				
User groups				
Where are Data Centers				
Firm adds users/cases				
Archived cases different rate				

The Demo

Don't Rush The First Demo

Leave plenty of time for questions you have.

Be sure you are clear on features.

Be sure the appropriate people are present.

Don't be afraid to ask anything.

Control the Demo

Have features shown to you when you ask questions.

The List – The Comparison

Features	Relativity	Logikcull	Everlaw	Liquid Lit
24/7 User Help	x	x		x
Actions Date Stamped	x	x	x	x
Depo Transcripts				
Doc/Photo viewer	x	x	x	x
Email Documents from Outlook				
Email Photos Directly In		Box		
Firm uploads documents		x	Not Yet - nxt few months	
Full Text Search	x	x	x	x
Handles Video	x	x	x	x
How long in market			6	6	14
Tags - Firm Create	x	x	x	x
Mac Integration	x	x	x	app
Report Customization Ease	x	x		some
Response Time	15 min	6 min		15 min
Scan Directly to Program				
Secure sharing outside of firm	x	x	x	x
SQL				
Standard Screens Customizable	x			
Support hours for PST	8 to 8	24/7	8 to 6 / next morning	8 - 7 CST
User groups	x			
Where are Data Centers	Injar?	Amazon	Amazon	Virginia/Illinois/Texas
Firm adds users/cases	x	x		
Archived cases different rate	x	x		

Other Considerations

Implementation Costs
Travel Costs
Training Costs
Hours and Location of Support
Integrations

The Decision

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Review Your Chart
  What software meets all or most of your needs
  What can you live without

Get clear understanding of costs and process for implementation

Craft Your Report
  Intro – What you recommend
  Body – Why, how you made your decision, what software you reviewed, list
  Conclusion – Summary project plan, costs

QUESTIONS?

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