Selecting the Best Software for Your Firm

Find out how to locate, evaluate and ultimately implement the ideal tech solution to satisfy your needs.

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While very large firms may have the resources to create a proprietary tech product from scratch, for firms without a robust internal development team — or the budget to hire freelance software engineers — an off-the-shelf solution will likely be a more cost-effective option.

Whether a firm has a specific product in mind or just suspects new technology might improve operations, examining all potential software choices can help ensure it settles on the right one, according to Elizabeth Brooks, Co-Founder of Nimble Consulting Services, which provides legal technology selection and implementation assistance. She'll also be presenting on the topic and ALA's Annual Conference & Expo.

"The RFP process is pretty well understood, but sometimes we see people jumping to conclusions because their neighbor used something in the past," Brooks says. "They're not really pausing to define what requirements they think they need, developing use cases and actually seeing see what technology solutions exist in the marketplace."

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Before your firm decides to make its next significant tech investment, it may want to consider taking the following steps.

DETERMINE WHO'LL INVESTIGATE AVAILABLE SOLUTIONS

When the Connecticut-based Milford Law firm decided roughly five years ago to become a paperless office, Partner Vincent Averaimo initially hoped to research the possible technological options. He soon realized working with a consultant might be a better scenario for the firm.

"Obviously, I didn't have the same level of expertise, and being an eight-staff-member, four-attorney law firm, if I spent the time that was needed to vet companies without assistance, we'd be working [with] a man down, and losing that one revenue source could be detrimental to the practice," Averaimo says.

Some consultants primarily focus on a specific product, either because it provides the best commission or the consultant has implemented it before and is comfortable working with it, according to Alexander M. Babenchuk, Operations Manager at national law firm Sanders Phillips Grossman — which in recent years has added asset management software and case management and other solutions.

Babenchuk, who has used in-house personnel and consulting companies to select software, recommends meeting potential consulting candidates in person.

"We have them come in and try to figure out whether they're only selling one brand," he says. "A lot are trying to be vendor-agnostic but still have a certain formula or combination [they urge you to get]. Ask for implementation references; generally, through interviews you get a good sense of what you're going to get."
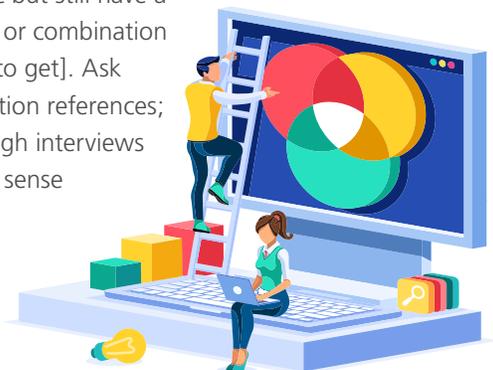
REQUEST A REAL DEMO

Tech vendors are often willing to walk you through how a piece of software is used; many say they'll provide a customized demonstration. In reality, though, they often present a canned version, according to Babenchuk.

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"They ask what you want to see in the demo," he says. "Then they pull the logo off my website, put it in their system and run through the same demo process they show everybody."

Diane L. Camacho, CLM, President and Chief Executive Officer of solo and small firm management consultancy DLC Consulting Services, suggests firms ask vendors for detailed examples to make sure they understand how the product works — and whether it would satisfy their specific needs.

"The demo is done by salespeople who most likely have never worked in a law firm, or with a service company," Camacho says. "Usually, the attorneys are in a hurry and don't drill down enough to be very specific. They don't say, 'You're saying I can calendar my court dates; show me how to do that with a Superior Court in Oakland.'"

KEEP INTEGRATION IN MIND

A product may address a pressing problem your firm needs to solve, but will it also work with other systems you have in place?

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"[Some items] offer very limited reporting; you have to download everything to Excel and modify it. Are you going to do that? How frustrating will it be?" Camacho says. "It's important to have a program that you can get financial reports out of, whether it's [accounting software] or a time and billing program, to figure out if you're making any money."