



# Technology Assessment

Know what's working. Fix  
what's not.



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# Technology Assessment



## What This Is

A clear, comprehensive evaluation of your firm's current technology – designed to uncover inefficiencies, align systems with your goals, and provide a practical roadmap for improvement.

Legal technology should enhance how your firm operates, not get in the way. Yet many firms find themselves relying on outdated systems, disconnected tools, or inefficient processes without a clear sense of what's working – or why certain frustrations keep resurfacing.

My Technology Assessment service helps law firms take stock of their current systems, identify opportunities for improvement, and make confident, informed decisions about what to change, upgrade, or keep. It's ideal for firms experiencing growing pains, planning transformation, or simply looking to sharpen their tech strategy.

This isn't a surface-level review. It's a tailored, hands-on assessment that delivers both strategic insight and practical next steps.

## What I Deliver

This assessment goes beyond surface-level observations. I provide a structured, end-to-end review of your firm's technology ecosystem – combined with practical, tailored recommendations grounded in legal industry realities. My approach focuses on understanding how your systems function in context, identifying where they fall short, and highlighting meaningful opportunities for improvement.

- **System Review:** A structured, end-to-end audit of your technology environment – including practice management systems, CRM, document automation, onboarding tools, time recording, reporting, and other core platforms. I evaluate usability, integration, performance, and risk.
- **Needs Alignment:** I work directly with stakeholders across the firm to understand how current tools align with real-world workflows, business goals, and client expectations. This ensures that recommendations are rooted in how your firm actually operates – not just how the systems were designed to function.

# Technology Assessment



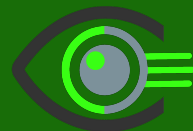
- **Benchmarking and Legal Tech Trends:** Your current technology is assessed against modern best practices and legal tech trends. I highlight where you're leading, lagging, or missing opportunities relative to firms of similar size and complexity.
- **Opportunity Identification:** I identify practical, high-impact improvements – whether that means automating a manual process, replacing an underperforming tool, consolidating platforms, or simply using your current tools more effectively.
- **Cost vs. Value Analysis:** For any proposed upgrades or system changes, I provide a balanced view of potential return on investment, ongoing costs, and implementation effort – helping you prioritise what delivers value and avoid over-investing in underused features.
- **Futureproofing:** I offer guidance on building a scalable, adaptable technology environment that can evolve with your firm. That includes recommendations around open standards, integration pathways, and vendor sustainability.

## Why Me

Choosing the right partner for a technology assessment matters. You need someone who not only understands the tools, but also the people, processes, and pressures that shape how law firms operate. I bring deep sector experience, independent thinking, and a practical mindset – ensuring that every recommendation is both strategic and workable in the real world.

- **Nearly 30 Years in Legal Tech and Operations:** I understand the unique systems, structures, and pressures law firms face – from compliance and confidentiality to billable targets and client demands.
- **Independent and Vendor-Neutral:** I don't sell software or earn commissions. My advice is unbiased, based solely on what suits your firm's needs, size, and strategy.
- **Customised to Your Firm:** No templates. No generic slides. Each assessment is tailored to your firm's goals, structure, and existing tools – so recommendations are relevant and ready to act on.
- **Strategic and Practical:** I bridge the gap between strategy and execution, providing not just high-level insights but grounded, implementable next steps you can trust.

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- **Ongoing Support if Needed:** Should you choose to move forward with implementation or procurement, I can remain involved to help drive delivery, manage vendors, or ensure successful rollout.

## Let's Talk

If your firm is unsure whether your current systems are helping or hindering performance, or if you're preparing for a period of growth or change, a Technology Assessment is a strong first step.

It delivers the insight, clarity, and direction you need to make smarter technology choices – and ensures your firm is set up for sustainable success.

Get in touch to start the conversation.



Book a **FREE** 30-Minute Discovery Consultation [HERE](#)



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