Beyond the Features

Legal Tech Selection Checklist
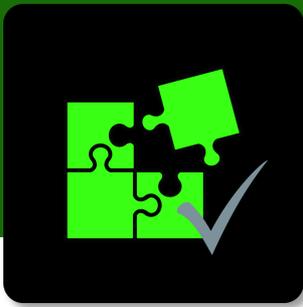
✉ david@blindspot.solutions

📞 +61 413 723 333

🌐 www.blindspot.solutions

BlindSpot SOLUTIONS

# Introduction to the Legal Tech Software Selection Checklist

Choosing the right legal tech solution is a critical decision for any law firm. The right software can streamline workflows, enhance collaboration, improve compliance, and ultimately drive better client service. However, with an overwhelming number of options on the market—ranging from practice management platforms to document automation and AI-powered analytics—selecting the best-fit solution requires careful consideration.

Too often, firms focus on specific features without considering the broader picture—how the solution will integrate and function within their existing legal tech stack. A system that looks impressive in isolation may create inefficiencies, data silos, or security risks if it doesn't work seamlessly with other tools used across the firm.

This Legal Tech Software Selection Checklist is designed as a practical guide to help law firms evaluate potential solutions methodically. It outlines key factors to assess when contemplating a new legal tech investment, ensuring that firms consider not only the software's features but also its usability, security, integration capabilities, and long-term value.

This checklist is generic and can be adapted for all areas of legal technology, including:

- Finance systems
- Time and billing software
- Document management
- Document automation
- CRM and Business Development
- Case management
- Business intelligence
- Workflow tools
- Legal research and legal content platforms
- AI-powered legal solutions
- Integration platforms
- Data warehousing and data lakes

BlindSpot
SOLUTIONS
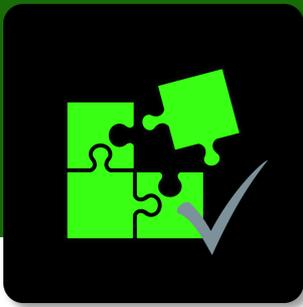
How to Use This Checklist

Think of this checklist as your roadmap through the legal tech selection process – whether you're buying a completely new solution or replacing a legacy system that no longer fits the bill. It's designed to help you structure your thinking, clarify your firm's priorities, and ensure that important questions are asked before any decisions are made.

You don't need to treat every item as mandatory. Some may not apply to your firm, your size, or your immediate goals – and that's perfectly fine. The value of this checklist is in the thinking it prompts. Even if certain items don't feel relevant at first glance, they may spark important discussions or uncover future needs you hadn't considered yet.

Use it:

- At the start of the process to shape your scope and selection criteria

- As a guide during vendor demonstrations and product comparisons

- As a sense-check before final decisions are made

By following a structured and holistic approach, you reduce the risk of being swayed by flashy features, vendor hype, or short-term fixes. Instead, you'll be positioned to choose a solution that fits your firm's real-world workflows, supports strategic goals, and can scale with you as your needs evolve.

💡 *Pro tip:* Treat the checklist as a living document – update it as your project progresses or as new insights emerge from stakeholder feedback and vendor discussions.
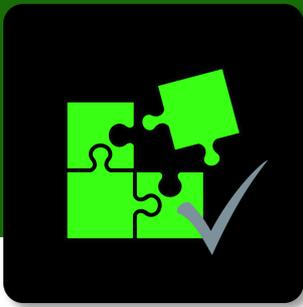
1. Define Business Needs and Objectives

☐ What problem(s) is the software intended to solve?

☐ Who will be the primary users (lawyers, support staff, IT, clients)?

☐ What are the must-have vs nice-to-have features?

☐ What are the firm's short-term and long-term goals for adopting this software?

2. Software Functionality and Features

☐ Does it support core legal workflows (e.g., matter management, document automation, time tracking, billing)?

☐ Is it cloud-based, on-premises, or hybrid?

☐ Does it include AI-powered features (e.g., contract analysis, predictive analytics, automation)?

☐ Can it handle multiple jurisdictions, practice areas, and regulatory requirements?

☐ Does it provide built-in compliance tracking (e.g., GDPR, AML, industry-specific regulations)?

☐ Does it support collaboration (internal teams, external counsel, clients)?
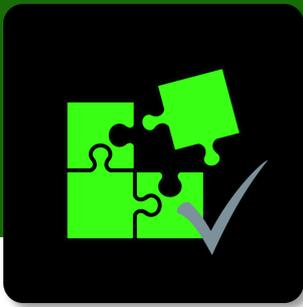
3. Usability and Accessibility

☐ Is the user interface intuitive and easy to navigate?

☐ Can non-technical users easily adopt the system?

☐ Is it accessible for users with disabilities (e.g., screen reader compatibility, keyboard navigation, high-contrast mode)?

☐ Does it have a mobile-friendly design or dedicated mobile apps?

☐ Is there a demo or trial available for user testing?

4. Integration and Compatibility

☐ Does it integrate with existing firm systems (e.g., practice management, DMS, billing software, CRM)?

☐ Can it connect with third-party tools via APIs?

☐ Does it support Microsoft 365, Google Workspace, or other productivity suites?

☐ Is there a marketplace or ecosystem for additional integrations?
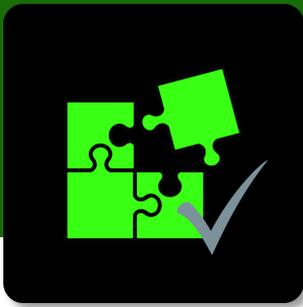
Beyond the Features
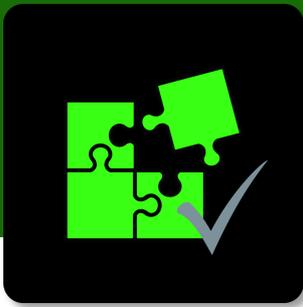## Legal Tech Selection Checklist

5. Security and Compliance

- [ ] What encryption standards does the software use (e.g., AES-256, TLS 1.2+)?

- [ ] Does it offer multi-factor authentication (MFA) and role-based access control (RBAC)?

- [ ] Does it comply with legal industry security standards (ISO 27001, SOC 2, GDPR, HIPAA, etc.)?

- [ ] Is data stored in a secure, region-specific location to meet data sovereignty requirements?

- [ ] What backup and disaster recovery measures are in place?

6. Cost and Pricing Model

- [ ] Is the pricing model per user, per matter, or subscription-based?

- [ ] Are there any hidden fees (e.g., setup costs, training, additional integrations)?

- [ ] What is the total cost of ownership over the next 3-5 years?

- [ ] Are volume discounts or flexible payment options available?

7. Vendor Reputation and Support

☐ How long has the vendor been in the legal tech industry?

☐ Are there law firms of similar size/practice area using the software?

☐ What do independent reviews or case studies say about the product?

☐ What support options are available (24/7, phone, email, chat, in-person)?

☐ Does the vendor provide onboarding, training, and regular product updates?

☐ Is there a strong user community or knowledge base for self-service support?

8. Data Migration and Implementation

☐ Does the vendor offer data migration services from existing systems?

☐ What is the expected implementation timeline?

☐ How disruptive will implementation be to daily operations?

☐ Are there training resources or personalised onboarding programs available?
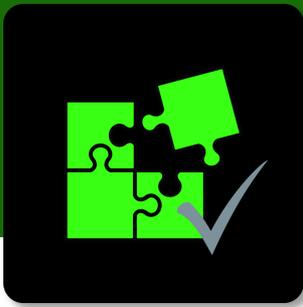
9. Scalability and Futureproofing

☐   Can the software scale as the firm grows?

☐   Does it support automation and AI-driven insights for future efficiency improvements?

☐   Is the vendor actively developing new features and enhancements?

☐   How frequently are updates and improvements released?

10. Decision and Next Steps

☐   Does the software meet the firm's functional, usability, and security needs?

☐   Have key stakeholders (lawyers, IT, admin staff) tested and provided feedback?

☐   Does the cost justify the benefits?

☐   Have reference checks been conducted with existing clients?

☐   Is a proof of concept (POC) or phased rollout possible before full adoption?
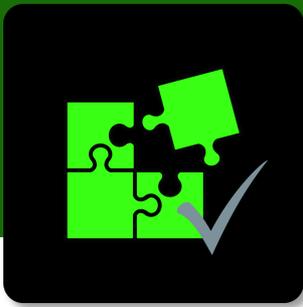
## 11. Internal Resourcing and Change Management

☐   Does the firm have a change management plan to ensure adoption?

☐   Is there a dedicated project manager or team responsible for implementation?

☐   Do internal teams have the necessary expertise to configure and maintain the system?

☐   If not, will external consultants or vendors provide support, and at what cost?

☐   Does the firm have internal resources to manage the project effectively?
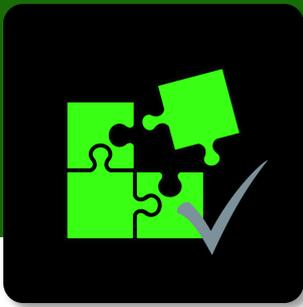
Need Help Navigating the World of Legal Tech?

Choosing the right legal technology is a high-stakes decision that can impact firm efficiency, client service, compliance, and long-term growth. With so many factors to consider – from functionality and integration to security, cost, and user adoption – it's essential to take a structured and informed approach.

BlindSpot Solutions partners with firms to simplify the selection process, reduce risk, and ensure long-term value from technology investments.

Services include:

- **Existing legal tech assessment:** Evaluate your current systems and identify gaps, risks, and opportunities.

- **Requirements gathering:** Work closely with stakeholders to define functional, technical, and strategic needs.

- **Software selection consulting:** Identify your needs, compare options, and make confident, data-driven decisions.

- **Implementation strategy:** Align new systems with your existing tech stack and workflows for a smooth rollout.

- **Change management:** Support user adoption and help teams adapt to new systems with confidence.

If you'd like help applying these ideas in your firm – or want to explore workshops, reviews, or tailored support – get in touch.

Website: www.blindspot.solutions
Email: david@blindspot.solutions