The COMPLETE GUIDE to Choosing the Best Legal CASE MANAGEMENT Software

GrowPath

INTRODUCTION

Choosing the best legal case management software for your firm can be daunting; however, if one gets it right, you'll be a hero to your firm. In fact, better case management often has more impact over time on firm profitability than any single employee or case.

....And we're here to help! We developed this guide to help you narrow down your choices and (hopefully) get you closer to a decision. So, where should you start?

We suggest first evaluating your current case management software's Return on Investment (ROI). If your firm currently doesn't use case management software, consider the importance of a well-placed investment in software that will keep your firm competitive. Then, evaluate what features your firm would find most helpful. Lastly, take advantage of the free demos offered by many vendors.

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STEP 1:
Determine the ROI of Case Management Software

The old saying holds true, you get what you pay for. So instead of measuring case management software solutions solely by cost, we recommend one considers measuring by its return on investment (ROI) as well. The best legal case management software should pay for itself — and then some.

To help you determine the ROI for case management software, here are three questions to think through:

1. How much time does the software save your firm?

They say in the business world that time is money. The faster one can move from one case to the next without sacrificing value, the more profitable your firm will be. Faster results, higher profits, happier clients, and more satisfied staff.

2. Will it lead to better case results?

The best software solution will help you identify and close higher value cases upfront, maximize efficiency, as well as provide invaluable management insights throughout the life of the case. GrowPath's patented lead scoring tool is built into the software, which allows your firm to quickly sort out the high-quality cases from low-quality ones. It also provides a mechanism for objectively valuing the overall quality of leads from a particular channel.

Prioritizing your most valuable cases in a way that's meaningful to your firm right at intake helps ensure higher value throughout the entire case workflow.

3. Do you need other tools in conjunction?

More often than not, less expensive solutions usually mean cobbling together other applications to fill holes — and this adds up quickly. Many firms do not calculate the total cost of ownership. When determining value, not to mention the increased complexity of various third party integrated tools, consider whether you have a single "all-in-one" platform. For example, do you need a separate intake, analytics, texting or a document signature solution? Will you have to use another program to provide extra security for your and your clients' data? Do you have to pay for a separate CRM to document client contacts?

These additional costs can add up to hundreds of dollars per user per month if not included in a comprehensive legal practice management platform. Not to mention the increased level of complexity to integrating into your workflow or updating if it should change.

Once you understand the total cost in the aggregate, you can consider ROI. If the math works for you, without sacrificing functionality and efficient workflows, you've probably found the right software for your firm. Discussing the purchase decision in terms of ROI is something everyone understands — will it save time and help you earn more than any other solutions? If the answer is yes, then pull the trigger!

STEP 2:

Evaluate What Features Your Firm Needs to Become More Efficient; Accept No Less

DON'T SETTLE! Dare to think bigger for your law firm, and the right choice of software will naturally emerge from the crowd. If you are looking for the best possible legal case management software for your law firm, **the following five features should be non-negotiable:**

1. Seamless, platform-based intake, case management, and business intelligence.

You're short-changing yourself if your current software only provides case management. To truly manage your practice from end to end, you need to manage the entire life-cycle of a case, and to be able to do this, your software should have one seamless platform with intake, case management, and business intelligence (BI) all together to be effective.

Some companies integrate their intake software together with their or other case management software, while some offer the two as separate components. If you are looking at software that doesn't have its own intake, or encourages you to buy third-party intake integration, consider the additional costs of having to keep and maintain that as a separate add-on, as well as duplicate data entries when it's not all in a unified platform.

"Without data, you're just another person with an opinion."

The BI component of your case management system sets you apart from the masses. Having data from intake and case management in a BI tool puts your data to work for you. How so? With that data, you know exactly which markets and channels you're getting most traffic. Market your services heavily towards them. You know how long it's taking your firm to handle a case from start to end. You know how much revenue you're making, and how much you're spending.

If you are looking to grow your law firm or take it to a new level, not having a seamless platform of intake, case management, and business intelligence in this day and age is a non-starter.

2. Software Security

With law firms being frequent targets of ransomware, malware, spyware, hacking, brute-force password attacks, data hostage attempts, and more, software security should be one of the first things you should look into when shopping around for software. Neglecting this crucial aspect could lead to disastrous effects for your firm, your reputation, and your clients, should something go awry.

Make sure to have a conversation about security with the companies you are seriously considering before making any decisions.

3. Cloud-Based

The cloud is the way to go if you want to help future-proof and improve scalability of your software. You don't have to trade off security (see #2) for the benefits of the cloud. Platforms that use established cloud providers offer you the best of both worlds: security AND scalability. If the software is server-based, not only do you lose progress, scalability, and mobility, you add costs for hardware and maintenance.

A cloud solution allows you to be as mobile as you need, and you'll be able to access your data stored in the platform from anywhere with an internet connection. It also means that any bug fixes, security/feature updates, and patches are automatically done over the internet. Gone are the days where you have to accept aging software on aging on-premise servers.

4. Data Import Support

Is it clear how much support you'll get from your case management partner to import your existing data into their software? It's not easy to import big sets of data — and not every vendor is equipped to provide the support needed. Additionally, your data may "look" fine in its current software, but its level of quality on the back end can be a completely different matter. Choose a company that has experts in relational databases who can import your data no matter what state it's in.

If a vendor is inflexible with the formats they can accept, then you may limit the value of what you bring over. Ask the vendor about their data import processes and support.

5. Highly Configurable

Legal case management software isn't one-size-fits-all. It has to be adaptable to whatever practice area(s) your firm focuses on. Often, you're advised to ask if software is customizable.

Did you know that the words "integrated" or "custom" software means more costs to you? Custom work is typically work done by a vendor with the costs paid for by you. It is usually one-off, and not supported as a standard part of their offering. You'll end up paying to support it too.

What you want to ask for is software that can be highly configured (i.e. without development work) within the standard offering.

If custom work is offered instead of existing configuration options, stop and reconsider. Also, don't forget that integrations with other tools may not align with your integrated solutions upgrade timeline — it may even ultimately throw your integration and upgrades out of sync. That results in your software going out-of-date, or worse, introduces security vulnerabilities.

Whichever case management software you go with, the five features we discussed above should be on your list of must-haves. If you get the sense that the company is lacking in one or more of these areas, you may want to give them a second, third, and even fourth look... or, move onto the next software that does provide these features.

STEP 3:
Take Advantage of Free Demos

So, now you have a list of promising legal case management software prospects, but you need help narrowing it down.

One of the most effective ways of paring down your list even further is to take advantage of the free demonstrations that many companies offer. Here are 3 tips to get the most out of those demos.

Tip #1: Build your firm's wish list (now)

Before you start, sit down with a few people from different areas in your firm — from reception to leadership — to assess what it is that they would like their software to do. Look for problems they face that software might be able to solve. Here are a few questions you could ask:

- [ ] Are there any instances in your current workflow where you have to enter the same information twice? Or copy/paste information from one location to another?
- [ ] What types of reports or information would make your job easier?
- [ ] What do you spend most of your time doing? What tools might help you get these things done faster? Any current practices that could be automated?
- [ ] Where do you most often see human errors in creating documents or updating records?
- [ ] What software issues are causing delays and bogging down productivity?
- [ ] In general, what are some things that would help you do your job a little better?

Tip #2: Come with questions

Based upon your wishlist, you know the things that are important to you. The most valuable piece of advice I can give you is to ask the product expert to show you how those things work. Whenever possible, use an open-ended question. “Show me how we would do this.” “How would that work with our data?” In my experience, the best demos I’ve given were when our customers came with questions. It opens up a dialog between you and the product expert.

My colleague, Eric Sanchez, recently posted his thoughts on the importance of ROI, and he has included some great questions to add to your arsenal. Find them at: link.growpath.com/3Questions

Tip #3: Don’t go it alone

Changing case management software is asking everyone in your firm to make a major change, and likely do it while they keep juggling their already busy workload. The easiest way to facilitate this process is to build buy-in around the choice from the beginning. One of the things we always recommend you have is to have your most vocal staff members join you for demos.

We’ve found that by including them in the initial decision, you will usually have a much smoother onboarding process later on. It also helps take the burden off of you to catch everything being presented. The most vocal detractors often ask questions you may not have thought about!

Searching for legal case management software is incredibly time-consuming. A little preparation and asking the right questions will help you make the most of your investment. It may seem overwhelming now, but if you come in prepared, you’ll be surprised by how quickly you can weed out the winners from the losers.

In the following section, you’ll find a handy checklist to bring to your next case management software demo with pre-prepared questions to ask the vendor. Best of luck in your search!

CHECKLIST

Questions to Ask During Your Legal Case Management Software Demo

So you’re looking for new or improved case management software for your law firm, and you’re trying to narrow down your options. To get there, we recommend taking advantage of the free demos offered by many legal case management software companies.

But… what makes for a strong candidate? For starters, **determine** if your current case management software is giving you the ROI you’re seeking for the amount you’re investing into it. Then, save yourself some time trying to think of what questions to ask the vendor, because we’ve done it for you!

Visit **link.growpath.com/checklist** to download a short question card checklist to take to your demo. In the next pages, we explain what value you could derive from those same questions, and what you may want to look for in the vendor’s answers.

By the end of your conversation, you’ll hopefully have a clearer idea of which software option(s) are the standouts.

GENERAL

- [ ] **Is your software specifically built for a certain practice area?**

Why This Is Important: Legal case management software is not always a one-size-fits-all solution. Your conversation could potentially end right here if the software is best suited for areas your firm doesn't practice.

- [ ] **Who develops your software? How many lawyers are on your company's team helping to develop this software?**

Why This Is Important: If the software company isn't consulting lawyers to help improve the product, or had lawyers help build the product from the beginning, then how do they know what they're doing?

- [ ] **Can you provide concrete examples of how other firms have used the software to automate and streamline their processes?**

Why This Is Important: This shows that the vendor made an effort to understand their customers' pain points and how they aligned their software with those pain points to solve them.

- [ ] **What is the size of your biggest customer's firm? What about your smallest customer?**

Why This Is Important: This question could help you gauge how scalable the software is as your law firm grows, and how effective it is for different firm sizes.

- [ ] **How long does the implementation process take, and what support can I expect during the process?**

Why This Is Important: The process of training and getting your staff familiar with new software can seem daunting, so you want to partner with a vendor that provides customer training and support past implementation. The vendor should help settle your law firm into the software beyond implementation and help keep your employees, well... sane.

- [ ] **Do you offer customer support services? If so, what are your support services like?**

Why This Is Important: Beyond implementation, you and your staff will inevitably run into questions and issues as you learn, and get used to, the software. Make sure to ask the vendor when support for the software is available — what days and times? Is it online or over the phone? Do you have to troubleshoot on your own, or do they have a team ready to help you? (You may want to pay attention to online reviews for customer service kinds of issues)

- [ ] **How does your pricing and financing system work?**

Why This Is Important: One of the things you are probably most concerned about when shopping for legal case management software is price. Keep in mind though that oftentimes, what you pay is what you get. "Budget" options may mean the software doesn't get updated often, a feature you may want/need was sacrificed, OR you have to purchase third-party integrations to make up for what's missing that it ends up costing you more anyway.

- [ ] **Is there a contract?**

Why This Is Important: We don't have to tell you how important contracts are; we're sure law school hammered that in. Some good conversation starters: Are you locked into a long-term contract with the vendor once you sign the dotted line? Are you paying a lower price for the first year of usage, and then paying significantly more at "regular price" beyond that? Do they have any satisfaction guarantees?

FEATURE-SPECIFIC

- [ ] **Do you have an intake management program with your case management program?**

Why This Is Important: Your case management software is only as effective as your intake management. Is their "intake" an extra third-party integration that you have to pay separately for, or do they have their own intake management? Integrations are fine if they work seamlessly with the software, but beware of potential pitfalls like data not transferring accurately or needing to always upgrade the software so that they work hand-in-hand.

- [ ] **Could I integrate existing tools that I'm already using?**

Why This Is Important: If your law firm is using Microsoft Outlook or QuickBooks or some other platform, for example, it's important to know whether or not you'll be able to keep using them. Same with the calendar feature. Can you carry over what you are using now, or do they provide a better solution? Does the vendor favor or promote one platform over another?

- [ ] **What can your document management system do?**

Why This Is Important: Document management is where you will likely find some good pain points to discuss with the vendor. You may want to ask the vendor to demonstrate how effective their document management system is, because this will make a world of a difference to your clients, to your staff, and to you.

- [ ] **Is the software flexible enough to work with my processes configurable to my law firm?**

Why This Is Important: Your business should not have to conform nor be limited by your technology.

Can I track my referrals?

Why This Is Important: Referrals can be crucial to a firm's revenue. Does the software have a central referral tracking system and can it give you reports on that data? Knowing where your referrals are coming from and where they are going can change your firm's game drastically.

Do you have a data analysis feature?

Why This Is Important: Analytics, metrics, and reports. The best law firms in the world are keeping track of their firm's data and capitalizing on the things that are working best, and improving what needs to be improved. If you have a giant data set, but have to then hire an outside source to crunch the numbers and summarize what the data is telling you, you should look into whether or not the software you're considering has this feature built in.

Can it track my marketing efforts?

Why This Is Important: Similar to asking about data analysis above, you may want to consider upping the ante on your marketing efforts — your competitors are. Again, all of your data is already in the software. Shouldn't it also be able to find the patterns that emerge out of your marketing efforts? Especially if you are advertising through direct mail, TV, radio, billboards, etc. Which marketing avenues are giving you the best ROI?

How does it keep track of all of my firm's deadlines?

Why This Is Important: We certainly hope the software you are looking into has the ability to keep track of your firm's deadlines. Does the software integrate with a calendar? Can it keep track of Statutes of Limitations? Does it remind you well in advance when a deadline is approaching, and keeps reminding you as it gets closer? Make sure that the user interface is easily read and user-friendly. A tracker that is too cluttered can actually become counter-productive by overwhelming you with things that aren't important just yet.

Can it communicate with my clients through the software?

Why This Is Important: Your legal case management software should give you the ability to communicate with your clients about their legal matters. Ask if the software comes with email integration or SMS features. Your paralegals shouldn't have to copy-paste replies and sent items into the software — the software should automatically be doing that for you.

What features are unique to your program that no other legal case management software currently has?

Why This Is Important: Innovation is key. Many legal case management software these days have similar features and offerings. You have to ask yourself whether the vendor you're considering is an innovator — a leader — in the case management software market. You need a software vendor who is constantly looking to improve their software and isn't willing to be complacent with their current product — to bring things to the table that you didn't even know your law firm needed or wanted. Software that has patented features mean that not only do their competitors not have it now, but that they never will.

TECHNICAL

What are the system requirements to run your software?

Why This Is Important: Make sure that the software is compatible with the hardware your firm is already using. If not, you may have to purchase more powerful computers. If the software keeps crashing because your computers are too old or too slow, you may be losing efficiency. Software that lives in the cloud will have significantly less tech required than on-premise options.

Your vendor can help tell you how much power is just right to run the software efficiently for everyone in your law firm, and on what system.

Where is my data stored? Will you be transparent if my law firm's data is attacked?

Why This Is Important: Is my data in the cloud or a server? How secure is the cloud/server? What security protocols are in place to protect your firm and your client's sensitive information? Perhaps most importantly, ask what the vendor's processes are if they do suspect a breach. (Do they have a process of notification, and what should you expect if it happens?)

Law firms are frequent targets of malware, spyware, hacking attacks, and other malicious digital schemes. Knowing where your data goes and how it's protected should give you some peace of mind.

What security systems do you have in place to safeguard my law firm and my clients' information?

Why This Is Important: Speaking of security, have the vendor take the time to explain what security features they have built into their software. This can get very technical very quickly, so have the vendor give you the version that you can understand, and have them give your IT department the information it needs to assess the software's security legitimacy.

How frequently do you update the software? If I encounter an issue, how quick is the turnaround to get it fixed?

Why This Is Important: Software should be a dynamic, living thing. As bugs get fixed and better solutions are rolled out, your software should be updating itself regularly. Ask how quickly you can expect them to fix any glitches or bugs you encounter. Another important thing to know is whether or not you have to update the software manually, or if updates get pushed by themselves. Especially for a larger firm with many users, consider how long it would take for everyone's computer to update the software.

Are you cloud-based or server-based?

Why This Is Important: This often affects pricing. Going with the cloud is recommended because you won't have to worry about buying a server to host the software, manually updating it, and you won't have to fear that it will "go out of date." With the server option, you will likely have to buy the software license, and you won't get the same amount of support as you would with the cloud option. We continue to be advocates of the cloud and that will always be our recommendation. Ultimately, though, it's what the best fit is for your firm that counts.

Schedule a demo today!

growpath.com/demo