

Which practice management software is right for your firm?

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7 KEY QUESTIONS
to help you assess &
choose legal practice
management software.



Choosing software to help you run your firm and manage your client work takes time and research.

There are many software review sites to read, complex feature lists to interpret and compare, and the pros and cons of on-premise vs cloud solutions to get your head around. We know you'd rather be focusing on growing your practice and helping your clients. We've compiled the key questions to ask yourself when evaluating new practice management solutions.

We hope it makes your decision easier and gives you confidence in your selection process.

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7 key questions about law firm software

1 Can it scale?

If your billable hours are on the increase or you're expanding your practice into new specialties, you may find your practice outgrows the limitations of your software. Avoid getting locked into long fixed-term contracts that restrict your ability to upgrade when the time's right.

Questions to ask:

- ❑ Once I sign up, how long am I locked into this solution?
- ❑ If I decide the software isn't right for my business, what's the cancellation notice period?
- ❑ Am I able to adjust my users up or down during my contract?



2 Can it be tailored to suit my firm?

Mixed practice and larger specialty firms will require some customization to reflect the way you do business and gain the most from your practice management software (such as custom workflows, automation and reporting). If you want to start with a simple product, make sure there are good options within the product to upgrade to that accommodate the future growth and diversification of your practice.

Questions to ask:

- ❑ Do I need to create custom reports and other custom data fields?
- ❑ If I want to tailor the system's workflows to match our way of doing things (or processes), how customizable is the software?
- ❑ Do I need to integrate my own precedents?

3 Are there additional fees for maintenance and support?

Beware of hidden costs for maintenance and support. Once your implementation is complete, you want to ensure your practice fully embraces your new software with easy access to helpful support for the whole team without incurring additional costs. For example: there are many legal practices paying hefty annual maintenance plan (AMP) fees for server maintenance which is expensive and unnecessary with cloud-based solutions.

Questions to ask:

- ❑ Do you provide free support? For how long?
- ❑ Beyond the monthly cost of the software, are there any other costs I should be aware of?
- ❑ How will I access new features and software updates? Is there a charge for this?



4 Will I retain data ownership and can I migrate my data?

I own my data right?? In some cases, no. Be sure to understand how you can extract your data (and if there is an associated fee), should you wish to move away from a software system. You'll also want to consider any implications for data protection and data sovereignty to ensure your new solution meets your compliance requirements.

Questions to ask:

- ❑ Is my data backed up?
- ❑ Do I retain ownership of my data and what is the process for data migration if I wish to move away from this system in future?
- ❑ How do I extract my data if I cancel my software system?



Over the past 20 years I have used or test-driven most of the practice management systems created for lawyers, and I have found that Actionstep is the only one that gives me the tools and the flexibility to do what I want.

Nothing else comes close to Actionstep.

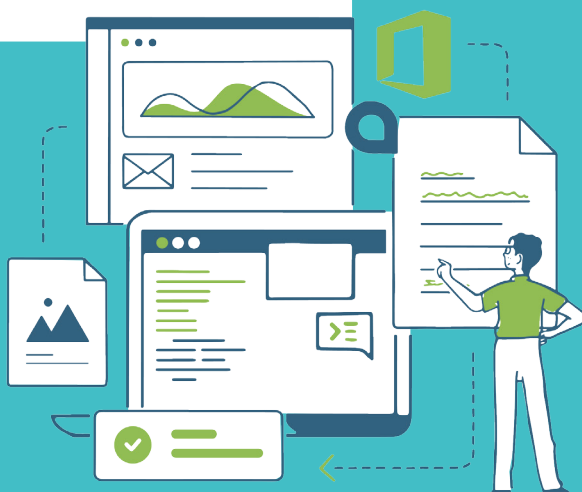
Peter Mericka, Managing Partner, Lawyers Conveyancing

5 Can I integrate the system with tools I currently use and love?

What other software do you rely on to run your business? Think email, document management, accounting etc. In some cases, your new practice management solution may handle these requirements for you. It's a good time to pause and consider if you can reduce your software subscriptions and consolidate into one robust solution. If you prefer to keep things separate, you need to ensure your new solution integrates nicely with the software you're already using.

Questions to ask:

- What other software does the system integrate with?
- Can I see how the system integrates with (whatever software is important to your practice)?



6 Can I implement the system myself?

Successful implementation of a new practice management solution requires planning, time and expertise. For example, what workflows or processes do you want to automate? What reporting is important to your practice? Ask vendors about what choices you have for implementation, and what they recommend for the most successful implementation, with the least inconvenience and cost. Is your time best spent in self-implementing? Investing in a little expert assistance upfront to get you up and running, can save you money in the long run.

Questions to ask:

- What are my options for implementation?
- What are the time and cost expectations for implementation?



7 Can I access the system on-the-go?

The days of being tied to the office are long gone. Make sure any practice management system you are considering doesn't limit your ability to work wherever you want to. A cloud-based solution will offer secure, remote access and mobile apps that allow you to access your case details when you're traveling, or at a client site. Many on-premise or server-based solutions require your software to be installed on a single device, where cloud-based software offers genuine anywhere, any device flexibility.

Questions to ask:

- How does your software handle remote access?
- Am I limited to a single device, or can I access from any device?



At Actionstep, we've been in the business of building great practice management software for 15 years.

We've learned so much about what lawyers need to manage their practices, reduce administrative burdens and free up enough space in their day for client nurturing and business development.

If you'd like to learn more about Actionstep, contact us for a demo of Actionstep and see how we can help your law firm grow and thrive.

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