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Selecting the Best Software for Your Firm

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

ERIN BRERETON
Owner, Chicago Journalist Media

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."

Clarifying expectations and performing due diligence work can vastly improve the outcome of the software selection process.

Clarifying expectations and performing due diligence work can vastly improve the outcome of the software selection process.

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."
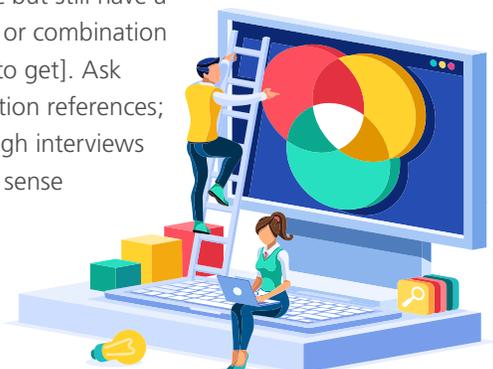
REQUEST A REAL DEMO

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.

Firms need to ensure any software they choose doesn't hinder their ability to perform certain tasks, such as being able to pull reports.

"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?

Firms need to ensure any software they choose doesn't hinder their ability to perform certain tasks, such as being able to pull reports.

"[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."

If a software provider won't let you sample its product, to avoid buyer's remorse, Camacho suggests asking for a monthly contract.

INVESTIGATE EXTRA EXPENSES

Firms sometimes overlook software licensing details, according to Brooks, which can impact a solution's overall cost.
"Think that through — how many people need to use the system?" she says. "If you need to add more people, what will that cost? Usually, it's not just an all-you-can-eat model. Don't get caught unaware; that can vastly affect price."

ADDRESS IMPLEMENTATION NEEDS

Temporary help may be required to facilitate software deployment. When Milford Law went paperless, the firm didn't initially clarify who'd perform the associated scanning work in its initial agreement with the consultant it engaged.

"I knew my staff didn't have enough time to sit there and scan documents," Averaimo says. "We immediately came to the conclusion the consulting company should have their people — whoever they hired as a temp or someone within their business — come into the office as a final component of the project."

CONFIRM WHO YOUR CONTACT WILL BE

Whether a business partner or consultant will be handling implementation, you want to know exactly who is going to be doing the work, and their background with the particular application, according to Bill Painter, Chief Innovation Officer and Shareholder at 750-attorney firm Baker Donelson, who also serves as Chair of the firm's Technology Committee.

"A lot of times, consultants bring in a team to sell something, and the person who shows up at the door [to pitch it] and the one who starts to work on it are not the same person," Painter says. "[Ask], 'Are you going to be the one in the room with me who I want to talk to?'"

After finding out vendors sometimes outsource implementation to a third party, Babenchuk's firm now sends two contracts, for the software and the implementation process, when adding new technology.

"[We've had] good and bad implementations where one the company knew the exact software and did well; others just started working with it three months ago, so they had a lot of questions," he says. "Implementation is 85 percent of what you're buying, because if it's not correct, no one will use it — so the entire purchase is a waste."

TRY TO TEST THE PRODUCT

Baker Donelson's Technology Committee, comprised of shareholders, attorneys and office administrators, serves as a sounding board for the firm's technology team, viewing demonstrations and sampling products to provide feedback on how they may serve end-users.

Painter recommends initially running a new application in a test environment to see what impact it may have on your systems — and to allow end-users to see what it does or doesn't do.

"We had a situation a year or so ago where the initial group had reviewed a software package and thought it was fine," he says. "We rolled it out to a test platform, and the feedback was it was clunky and didn't work well. There were a lot of issues; we pivoted and went in another direction."

If a software provider won't let you sample its product, to avoid buyer's remorse, Camacho suggests asking for a monthly contract.

"Don't let the salesperson sell you for a year if you're not comfortable with it — that's a long time," she says. "Spend the extra $2 a month and buy it for three months on a month-to-month basis. Give it three months, and if you're still frustrated and not getting the support you need, if you don't think it's going to get better, don't be afraid to back out." ∎

ABOUT THE AUTHOR

Erin Brereton is a freelance writer, editor and content strategist who has written about the legal industry, business, technology and other topics for 20 years.

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