Legal Technology Provider Requirements Checklist

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There are so many things to consider when choosing a legal technology provider—so it's natural to feel a little overwhelmed.

To simplify your firm's search for the best legal technology provider, we've created an easy-to-use checklist detailing questions to ask and feature requirements to include in your evaluation. It's designed to make the process more manageable and save you time, while still getting down all the important information.

Question	Input
Do you offer built-in payment processing?	
Describe your time tracking functionalities	
Describe your e-signature functionalities	
Describe your intake functionalities	
Describe your document management functionalities	
Can I access your tool remotely when I'm on the go?	
How do I keep track of client matters?	
Do you integrate with Outlook/Google?	
What accounting features do you offer?	

What limits do you have with document storage?
What limits do you have on individual file upload size?
What type of reporting and analytics do you offer?
What software tools do you integrate with? How well do you integrate with them?

Question	Input
Can you help me with trust accounting compliance?	
Are you compliant with HIPAA/GDPR/PCI?	
Where are your servers hosted?	
What type of encryption do you use?	
Do you offer 2FA?	
How do you ensure my client data is protected and secure?	
How is your software ranked on the market? (Capterra/G2/etc.)	
What is your retention rate of clients?	
Are you approved by my local / state bar and the ABA?	
What is your uptime guarantee?	

How do I get my data out of your system / upload to another if I cancel?

Question	Input
What type of support options do you offer?	
What are your normal support hours? Do you have different support hours in case of holidays?	
How do I reach somebody in case of an emergency?	

Question	Input
Is there an additional cost for migration support?	
What is your average length of time for a typical implementation?	
What level of expertise is required to manage the software?	
Do you offer migration support if I'm already using another tool?	
Do you offer training?	

About Clio

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