A 3-Step Guide for Assessing New Law Firm Technology

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Adopting new technology for your legal firm can be game-changing for how the firm operates, helping to reduce and automate administrative tasks, increase efficiencies, and grow firm revenue. If you're eager to find new ways of working and to cut down on processes that don't serve your firm well, you might be looking at various technological solutions that you hope can help. If you have, you've likely discovered that there is a massive range of legaltech solutions on offer to you and your law firm, all promising different things.

If that's the case and you don't know where to start, don't panic! While the sheer number of options available to you can feel overwhelming, there are a number of steps you can take to make this process easier.

Following each of the steps below will help you to assess and implement law firm technology that works for everyone in your firm, whether that's managing partners, legal executives, legal secretaries, receptionists, an accounts team, or anyone else in your firm.

Here's what you need to do to make an informed decision and to adopt the law firm technology that will help your firm to do its best work and serve your clients.

1. Focus on challenges and pain points first

To determine if a tech solution is right for your law firm, start by defining the existing pain points that negatively impact how you operate. Then you can better assess if a tech solution will alleviate those issues.

Challenges for your firm may include:

- Optimising how you work remotely or using a hybrid model
- Gaining oversight of how your team works, whether in the office or on the move
- Better serving your clients, right from the point of intake
- Privacy, compliance, and data security issues
- Document organisation and management, and data access complexity

While there are many tech options available to law firms, it's important to remember that your firm and clients may not benefit from adopting every new technology that you come across. Focus on the quality of benefits (tangible and intangible) and how they fit

your firm's unique needs to decide on the right fit for you.

If this is a technology that is likely to be used across teams and roles within your law firm, consider asking other law firm members what they would like to improve in their work processes and what their pain points are. Doing so will give you a better idea of the whole firm's needs as well as increasing the likelihood that team members will be open to change when you choose and adopt your new technology. Making them part of the initial assessment may help them to feel more aligned and open to working in a new way.

At this stage, document any findings or insights you have. The more detailed and holistic you can be in this initial stage, the better.

2. Conduct a SWOT analysis

Using a SWOT analysis can be extremely helpful when it comes to choosing new legal software. This method employs four categories to help you get a broader look at the potential and the challenges that might come with your new technology. These categories are broken down into strengths, weaknesses, opportunities, and threats. Using each of those categories as a separate header, begin asking yourself questions about the software you're considering and write down the answers.

Some questions to consider under these categories include:

- **(Strength) How much money and time will this software save?**
  Will the software cut administrative time, improve your ability to track firm performance, or speed up client intake processes, for example? Is it competitively priced with no hidden extras (such as hefty migration fees)?
- **(Weakness) How difficult and time-consuming will it be to implement the new technology?**
  Is the software designed to be intuitive? Can you get a free trial before you commit? (For example, Clio offers an obligation-free, 7-day free trial.) Is there strong after-sales support and customer support if you encounter a problem?
- **(Opportunity) How much potential increase in profits and/or revenue will the new software generate?**
  Will the software make managing firm operations quicker/more efficient? Will it allow you to accurately track and record where you spend your time? Does it offer performance dashboards?
- **(Threat) What risks are involved if we adopt the new software?**
  Are you locked in for a long period of time to a contract if choosing this provider? (For example, Clio offers month-to-month and year-to-year contracts. Some providers lock users into restrictive, three-year contracts.) Are there severe penalties if you want to cancel early? Will it be easy for everyone in your firm to adopt (with training and support from the provider)?

Use this SWOT analysis to ask questions of your potential legal software provider. Make sure they can answer each question to your satisfaction *and* that they can back up what they promise in writing. (For example, you can visit Clio's pricing page for a detailed explanation of what is offered in each of our software packages—no hidden charges or surprises.)

3. Make a tech adoption plan

Once you've chosen your new software, it helps to map out a comprehensive transition and implementation plan.

Your plan should present answers to questions staff may have about how you will implement the new solution, such as:

- **What will the transition/migration period look like**?
  If you're planning to transfer your law firm's data to new legal software, you need to have a plan and a supporting team to accomplish this quickly, securely, and efficiently. For example, Clio offers comprehensive migration services and data migration support. Whether you're moving to Clio from a manual spreadsheet system, a server-based solution, or another cloud-based solution, a dedicated Migration Specialist will work with your firm to help transfer your data securely and quickly.
- **Have you shown firm staff the value of the software?**
  Staff who understand how the new software will make their work easier, more efficient, and/or less stressful—plus help the firm be more successful—will be more engaged with learning about the new software. As such, you should provide multiple training options. Consider a strategy that uses online and in-person training, on-demand how-to videos, a help centre, and skilled employees acting as tutors for other staff.
- **Have you communicated who will be responsible for what?**
  Be clear about who will be responsible for each aspect of the transition to avoid miscommunication and implementation gaps. But don't surprise anyone—be sure to communicate clearly and early with everyone involved.

If you'd like to explore more on how to adapt, implement, and change processes for your firm, Clio's resource hub on managing change for law firms can help. Find it here.

Conclusion

When faced with a lot of new technology options for your law firm, it can be difficult to know where to start making a decision. Using these three steps can make that process much simpler and more straightforward. These steps could lead you to a software solution that could revolutionise how your firm works.

Want to stress-test Clio, to see how it performs against the criteria above? Book a demo with one of our sales team, and they'll be pleased to show you exactly how.

About Clio

Clio is the global leader in legal AI, powering legal work across the profession, from law firms of every size to corporate legal teams, government agencies, and courts. Its Intelligent Legal Work Platform unites the business and practice of law, connecting the people, information, and processes behind legal work. Clio's AI brings the context together with legal sources drawn from Clio Library, a growing collection of more than one billion legal documents. Over 400,000 legal professionals in more than 130 countries rely on Clio to run their legal world. Learn more at www.clio.com.