Case Management Software: 10 Things to Consider Before Buying

Written by Teresa Matich

Choosing the right case management software is critical for your law firm. Making the wrong choice can be costly—both in terms of efficiency and potential security risks.

But, with the right choice, your firm can capture more time, send out bills more efficiently, and run more smoothly than ever before.

How do you choose the right case management software for your law firm? Here's what to consider to make sure the solution you choose covers the basics while helping you meet your law firm's goals.

1. Cloud-based vs. server based

Traditionally, many law firms have worked with on-premise, server-based software solutions for their practice management needs, but in recent years, cloud-based solutions have come to the fore. Cloud-based solutions offer a number of benefits over traditional software options, including:

- The ability to securely access firm information from anywhere—no need to be physically in the office
- Automatic software upgrades, eliminating the time, cost, and pain of manual upgrades
- The eliminated cost of hardware maintenance and upgrades, since cloud-based software is hosted on secure, remote servers

Automatic software upgrades can make a big difference for you and your firm, particularly when changes need to happen fast. For example, with GDPR regulations came into effect, competent cloud-based providers were able to quickly adapt and make changes to comply with the new rules. With an on-premise server-based system, there's a likelihood that you may need to wait for product updates to be installed—and you may even need to pay for a new version.

Whichever you choose, it's important to confirm whether or not the solution you're looking at is truly cloud-based. Some solutions that claim to be cloud-based require you to download software before using it—and that software may only work with certain types of devices, such as PCs. True cloud-based software is accessible anywhere, from any device.

2. Ease-of-use

This might seem obvious, but you'll need to evaluate the ease-of-use of any case management software you consider. It's easy to get excited about a sleek interface, but if it takes you 10 clicks to complete one of your common tasks like adding a contact, your new tool may make you less efficient instead of more efficient.

Think about the daily tasks you need to complete when managing cases, and run through how you'd complete these in the software you're evaluating. Examples might include:

- Logging time
- Adding notes and research information to cases
- Finding specific information for a certain case
- Opening a new case or adding a new contact to your system
- Billing clients

The right case management software will be designed to be intuitive, so that staying organised and completing administrative tasks is easy.

That said, keep an open mind: If you're used to completing a task one way in your old software, and there's a way to do it more efficiently in the new software you're considering, ask for a demonstration and see if you could picture yourself getting used to this new workflow. The time and energy you save will likely be more than worth this investment.

3. Security

Keeping client and firm information confidential and secure is paramount for your law firm. Some case management software solutions are more secure than others, so do your due diligence to confirm that your vendor is secure.

Due to simple economies of scale, cloud-based case management software is now considered to be more secure than traditional solutions. Cloud computing vendors have invested aggressively in security infrastructure that is orders of magnitude more secure than what a small to medium-sized law office would be able to invest in to protect on-premise servers. Clio, for example, heavily invests each year on security, penetration testing, a dedicated security team, and much more to make sure all client data is secure.

As Oracle states, "For many organisations, cloud infrastructure can provide a more secure platform than an on-premises data centre and help simplify cybersecurity with services that automate system security tasks and help reduce risk."

To make sure you're choosing a secure cloud-based case management provider, ask lots of questions about security during the evaluation process. Here are a few examples:

- Is all data encrypted?
- Is the system audited by third parties to ensure security?
- Are there multiple servers to provide geographic redundancy?

4. Mobile access

In the digital age, mobile phones reign supreme. On average, British people check their phones every 12 minutes, and as a lawyer, you're likely no different. It makes sense to be able to check in on your practice from your phone, wherever you are, so make sure that the case management software you choose has a mobile app that makes it easy to practice on the go.

Ask to see the mobile version of the case management software you're considering during a product demonstration, if you sign up for one (which is a good idea). Not all mobile apps are equal—some are far easier to use than others—so make sure you get a chance to see how easy it is to complete your daily tasks on mobile before signing on the dotted line.

5. Integrations

The right case management software shouldn't require you to stop using the apps and services you already love. Cloud-based solutions can work seamlessly with other popular programs, so you can keep all your firm information organised in a central hub without having to enter the same information into multiple apps.

Some case management solutions offer integrations, and some don't, so be sure to ask about this. For example, Clio integrates with over a hundred leading apps and services, including Quickbooks, InfoTrack, and Microsoft Office 365.

6. Reviews

If a vendor says they're the best, don't just take their word for it: Look for reviews from other lawyers who are already using the software. This will help you uncover some of the biggest benefits of the software you're considering (and any potential drawbacks). Some places to explore include the testimonials page of the vendor you're considering and third-party software review websites.

Note, if you see a few negative reviews, don't be alarmed. Fake reviews run rampant, and a few negative reviews are realistic for any product or company, so be sure to read both positive and negative reviews critically.

7. Cost

Of course, the cost of any software solution is a key consideration for any business. Make sure you have a clear understanding of all costs associated with the case management software you're considering.

With most cloud-based solutions, you'll pay a fixed price per user every month. Often, there's a discount if you pay annually. However, with some solutions, there may be additional costs for installation, setup, data migrations, maintenance, and even training, so be sure to ask about this during the evaluation process.

8. Adding/removing users

Make sure you have a clear understanding of the cost and process for adding and removing users from your account.

With some case management providers, this is easy: If you're on a monthly subscription, you'll stop paying for a user the month after they're removed, and if you're on a yearly subscription, you can easily transfer that account to another user. With others, you can only add or remove users when you renew your contract (which can last more than a year), and it may be difficult to transfer new user information after its initial setup. In other words, you may get stuck paying for licenses you're not using, or struggling to transfer licenses, if you don't do your due diligence.

If your assistant retires and you need to hire someone new, you need to know that you won't be left fighting with your software, so be sure to ask about adding and removing users up-front.

9. Transition experience

Unless you're just starting a practice and don't have any existing client or firm data, you'll want to consider what the transition process will be like. Transfering your firm information to a new platform is rarely a simple process, but some case management software companies do provide a smoother experience than others.

Here are a few questions to ask to ensure you'll have an idea of what you're getting into:

- Is data migration included in your subscription cost, or will you need to pay extra?
- What will you need to do to prepare for the data migration process?
- Will support be available?

In short, before you choose your case management software, make sure that you won't pay extra for the data migration process, and that you'll get plenty of help and support.

10. Support

Last, but certainly not least, look into the support provided by potential case management software companies. Whether you run into an issue, need help sorting through a workflow, or are just curious about how to get more out of your software, it's worth knowing that you'll have a good experience when you reach out for answers.

Questions to ask:

- What are the support hours like?
- Is there a dedicated support department?
- How can I ask for help? (Phone, email, chat, etc.)
- Do I need to pay for support? (You should be able to call a support line for free.)
- What's the average waiting time for a support call? (Don't get stuck waiting in long queues.)

Some case management software companies have award-winning support departments that can make a big difference in your experience, so don't neglect this final consideration.

Choose case management software that's right for you

Choosing a new app or service for your law firm can be overwhelming. However, the right case management software can make your firm more efficient and profitable than ever before, so the time and effort it takes to evaluate a solution is definitely worth the effort.

To sum up, here are a few key questions to ask:

- **Is the software cloud-based?** Cloud-based solutions allow for more mobility and are often more secure than traditional solutions.
- **What security measures are taken?** Make sure your provider is going above and beyond to keep your client and firm data safe.
- **Does it work on mobile?** In the digital age, you need to be able to check in on your practice from wherever you are, so case management software that includes a mobile app is essential.

By going over the items on this list, you can be sure that you've asked all the right questions to make the best choice for your law firm.

Clio is the case management software chosen by 150,000 legal professionals in 90 countries. See why—sign up for a free trial today.

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