Don’t Get Duped: Smart Questions to Ask Before Switching Legal Tech

Written by Sarah Murphy

In our daily conversations with law firms, a pattern has emerged. Firms full of optimism sign up for a new legal tech solution, only to find out it’s not all it was cracked up to be. These aren’t just stories – they are real experiences from people like you who wanted to make a positive change for their law firm and clients but ran into trouble instead.

Many are finding the technology that seemed so promising in a demo can be disappointing when it’s actually put to use day-to-day. It’s frustrating – the features aren’t as user-friendly, comprehensive, or reliable as they appeared. Then there are the unexpected costs that surface after the deal is sealed. Suddenly, there are extra fees for ‘essential’ features or pricey mandatory updates that weren’t budgeted for. And what about your precious data? Some folks have found out the hard way that transferring their own data out of the platform can be a significant headache – it’s like their data is being held prisoner. With Clio, you can avoid these unexpected costs and data transfer issues, providing a sense of security and peace of mind.

Here at Clio, we’re upfront and transparent. We help you navigate the legal tech market’s noise and clutter with practical questions and transparent information.

Clear choices, not clever sales pitches

We’re on a mission to give you the whole picture so that when you decide it’s time for a change, you won’t be left feeling duped by flashy demonstrations or tied to a system that doesn’t meet your needs.

We’re highlighting these issues to empower the legal community to make knowledgeable choices and hold all legal tech providers accountable to superior standards. Our focus is on guiding you toward a legal tech solution that not only fulfils its promises but also significantly enhances the efficiency and ease of your work.

Our goal is to help you cut through the hype and ensure that you know exactly what to expect and how to protect your interests if and when you’re ready to make a switch.

Asking what matters: The Legal Tech Litmus Test

Selecting the ideal legal tech solution for your firm is critical, and cutting through the marketing hype to find what’s genuinely beneficial for you is vital. It’s essential to arm yourself with the right questions that align with your expectations and enhance your legal practice.

We've compiled a crucial set of questions acting as a litmus test for evaluating legal tech providers. These questions are designed to challenge their promises, ensuring you gain a clear and honest understanding of what you're committing to. By concentrating on critical factors like functionality, support, and scalability, including core tools such as case management, billing, client intake, and document management, you'll confidently navigate the complex legal tech landscape. Let's delve into what matters most and ensure your technology investment truly pays off.

Read my blog post to learn more, The Ins and Outs of Long-Term Fixed Legal Software Contracts.

The real scoop — no sugarcoating

- **Honest feedback:** Insist on speaking with current customers to get the unfiltered truth about the software. These firsthand experiences can reveal how the tool performs under the stress of daily legal operations. Ask specifically about any downtime incidents, how updates are handled, and the realities of integrating the software into your current workflow.
- **Bulletproof security:** Demand a clear explanation of their security protocols. How do they encrypt data? What is their protocol for a data breach? Compare their answers to the gold standards in cybersecurity to ensure your firm's and clients' data are in safe hands.

All costs upfront — no nasty shocks

- **Straight talk on pricing:** Demand a comprehensive breakdown of all the costs involved, including any potential fees that could emerge later (e.g., for additional users, features, or data storage), and insist this is provided in writing. This guards against unexpected financial strain on your budget.
- **Continuous improvements:** Ask for a clear roadmap of their planned updates and innovations. What will these upgrades mean for your firm, and more importantly, what are the costs involved? This ensures the software evolves with your firm without constant additional costs.

Read more: *Navigating The Maze Of Vendor Lock-In: Strategies And Solutions For UK Law Firms*

Support that's actually supportive

- **Knowledgeable and available support:** Verify the type of support offered—is it 24/7, and does it include direct access to knowledgeable technicians? Ensure you're not stranded with a bot when facing a crisis.

- **A vendor that listens:** Assess whether they've made meaningful improvements based on customer feedback. This can indicate whether they treat their clients as partners or just as income sources.

Your data leaves with you

- **No exit nightmares:** It's critical to understand the data exportation process upfront. How easy is it to get your data out if you choose to leave? Are there fees? What format is the data in? Ensuring you can leave without losing access to your records is paramount.

To learn more about your data portability rights with legal software providers, read my guide.

Keeping it real with legal tech choice

The gap between the dazzle of the sales pitch and daily reality can be wide. That's why we're inviting you to share your real-life experiences—the good, the bad, and everything in between.

Your stories are essential in accurately portraying what legal tech looks like in action. Whether it's a tool that has transformed your practice, a solution that fell short, or an implementation process filled with pitfalls — your insights can help guide others in their legal tech decisions and foster a more transparent industry. Your experiences matter.

We want to hear from you!

Share your encounters with legal tech tools: What surprised you? What disappointed you? What advice would you give to others navigating this space? Your experiences can make a difference in steering the future of legal tech choices. We want to hear from you!

Please submit your stories to submissions@clio.com. We'll compile these narratives to help demystify the choices facing legal professionals today and ensure that the real scoop isn't buried under marketing hype.

Help us reveal what's truly going on after that slick sales pitch. Your experiences can make a difference in steering the future of legal tech choices.

Our commitment

At Clio, we believe making an informed decision about your next legal tech tool shouldn't require you to leap through hoops or decipher fine print. That's why we're inviting you to a straightforward conversation about what really matters—your needs, your concerns, and your aspirations.

Our commitment goes beyond just offering a platform; we're dedicated to clarity, honesty, and supporting the legal community through genuine, meaningful innovations. We know the decision to integrate a new tool into your practice is significant, and we're here to ensure you have all the information you need, free of surprises or hidden caveats.

By embracing the tough questions, sharing insights born from experience, and stripping away the unnecessary fluff, we're not just suggesting a new way but leading by example. With Clio, you're choosing a partner as invested in your success as you are.

Ready to see how Clio stands apart? Book a Demo with us. Dive into a conversation where your voice leads the way. Discover how our solutions can align with your unique goals, and let's lay the groundwork together for a future where your practice flourishes on solid ground.

Clio is not just a tool; it's a promise to stand by you as you navigate the complexities of legal tech. Because when you take the leap with Clio, you're never taking that leap alone.

Book a Demo

See exactly how Clio can help your firm by scheduling a personalised product walkthrough with one of our Clio experts.

See Clio in Action

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.