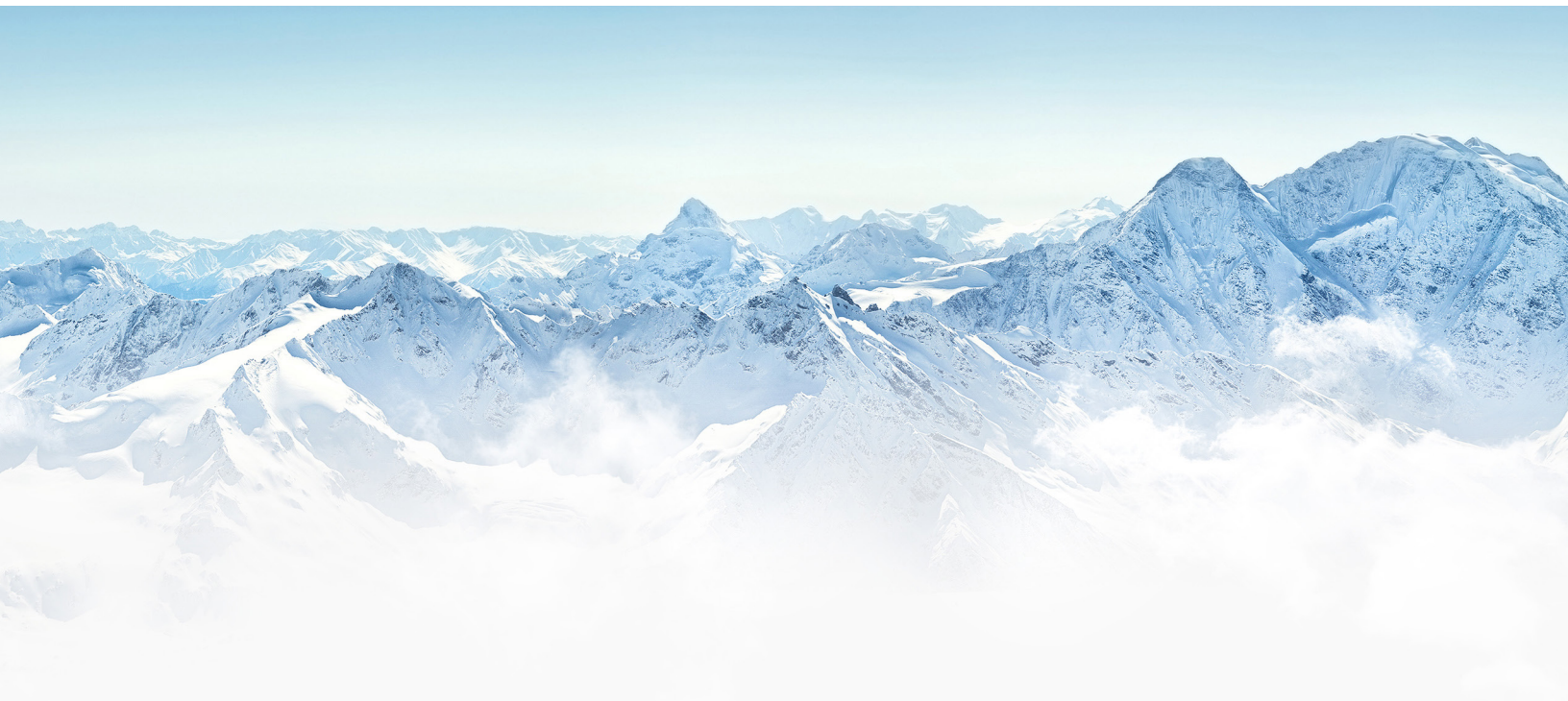


# Buyer's Guide for Legal Matter Management Systems

for Law Firms



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Law firms can benefit from modernizing their legal matter management. Real gains in productivity, cost control, revenue growth, service and innovation are possible by taking advantage of the latest technologies. This is only achievable with a sound understanding of business problems to be solved, associated value in solving those problems and a structured approach to technology selection and adoption. This buyer's guide provides a framework for law firms evaluating legal matter management systems.

### **Establish a Cross-Function Team**

The early involvement of the right functional areas in the law firm is essential to establish an initial needs assessment, develop an evaluation strategy, define a pilot project and gain necessary approvals. This will ensure well-represented participation focused on solving a real business problem and confirm senior business leaders and stakeholders support the process. Keep requirements high-level and focused on business needs.

As your knowledge grows, new ways to solve problems and innovate for your law firm will emerge. The cloud offers innovative ways for legal organizations to operate and introduces new business flows allowing fresh interactions with employees, clients and partners to achieve organizational objectives.

### **Draw talent from the following areas in your law firm:**

- Practice Management
- Knowledge Management
- Attorneys
- Billing and Accounting
- IT and Governance
- General Counsel

### **Focal Areas**

The following is a list of key focal areas to consider when evaluating legal matter management. This is not a comprehensive list, but it will provide important insights into critical elements for consideration.

**Matter-Centric Features and Functions.** Evaluate how all the information concerning each matter is organized and managed. Is the workspace centralized around each matter so that information and communications relevant to each are easily accessible? A good matter management system will offer features that allow you to log calls, send emails, schedule a meeting, manage matter participants, stay on top of critical dates, oversee workflow and more.

**Timekeeping and Billing.** A system with tightly integrated timekeeping will allow users to track time in context with their workflow. Client-matter billing analysis coupled with an integrated accounting solution should provide a 360-degree view of your profit and productivity. Identify whether the systems you are evaluating offer this tight integration.

**Document Management.** Document management is a critical aspect of legal operations and can be integrated into your case management system. When integrated, you can relate documents to matters, accounts, contacts or discussion threads. Be sure to consider the following: document workflow, volume and content type, processing capabilities, storage needs, degree of collaboration required and type of automation needed.

**Security.** Data security is a broad and complex subject. Physical protection means preventing theft, damage from fire, weather, earthquakes and tampering by employees or others. Security also includes user authentication, access control, privacy and more. A key benefit of a cloud environment is eliminating the cost and risk of applying acceptable security to your law firm's operational data. Carefully review the security protocols for any supplier under consideration.

**Governance Compliance, Geographic/Jurisdictional Data Regulations and Privacy.** You should understand how the case management supplier's infrastructure accommodates for global privacy laws and directives. Have they attained EU Safe Harbor self-certification, the Trustee Safe Harbor Seal and the Japan Privacy Seal? If so, by deploying through these suppliers and meeting security requirements, your firm can also attain these certifications.

**Mobility.** Today's legal professionals want a greater ability to work on cases and access information no matter where they are and what device they are using. Ask suppliers whether the solution allows for access and full functionality via phone, tablet or any connected device.

**Client Access.** Being able to collaborate with clients, outside parties and members of the team – no matter their location – is a tremendous benefit of effective case management systems. Can you use the system you are evaluating to collaborate on matters with clients and other associated parties?

**Cost.** How is the case management system under consideration priced? Is it subscription-based, whereby you pay per user per month and can cancel or add users at any point in time? Are you purchasing the application and hosting it in-house, which will require hardware and future upgrades? Make sure you know the difference between a cloud-based system and a hosted system so you can accurately evaluate the cost of the system over time.

**Availability/Recoverability.** It is important to ask the vendor what availability level it expects to deliver for the application, and whether that availability estimate includes planned outages. Planned outages are necessary to maintain the environment and are typically done at night and with notice so there is minimal impact on your business. You should also understand the supplier's process for data backup and disaster recovery policies.

**Integration.** Most law firms prefer to use software that has been designed for their specific needs. Good case management platforms can integrate with many other software offerings to help increase productivity and save time. Ask the vendor if its platform integrates with accounting, document management, CRM, contract management, email, telephones and other important applications your firm uses every day.

**Cloud Based.** Know whether the systems you are evaluating are software as a service (SaaS), platform as a service (PaaS) or infrastructure as a service (IaaS). There are different types of so-called “cloud computing” paradigms. Each offers its own benefits, which will weigh on your final decision.

## Conclusion

Highly effective case management offers advantages to improve your law firm’s operational practices, boost employee productivity, capture more clients and serve them better, cut costs and increase top line revenue. Careful evaluation of the options available to you using your newfound knowledge of case management tools will be critical to your success. Cloud computing offers supplementary benefits that are unmatched with on-premise applications, such as access and scalability, and are worth scrutiny during your evaluation process. The most successful, forward-thinking firms are finding case management solutions that are feature-rich, can lower costs by increasing efficiency and can level the competitive playing field no matter the size of the organization.

## About AdvoLogix®

Founded in 2006, AdvoLogix®, is a leading law practice and legal matter management solution that helps law firms and general counsel automate unique business processes and simplify legal matter management. The AdvoLogix cloud-based enterprise solution centralizes matter management, conforms to unique workflows and practice standards, and provides industry leading security and reliability. Built on the leading cloud platform, Salesforce®, AdvoLogix offers comprehensive configuration and integration with thousands of add-on applications to extend the solution to meet specific business needs.