

## Top 10 Things to Look For In a Small Law Department System

Small law departments will be the first to tell you that few power tools exist that have been designed specifically for them. If you think of your legal work like sculpting a statue, your choice of tools is limited to extremes: a chisel or a jackhammer, with little in between. So the process of evaluating the systems that are out there for the best fit is really important even if it's not your definition of entertainment. To help simplify the process, and add a little fun, check out this list of top factors to consider while you're shopping for the ideal small law department system.

1. **Easy** - complex legal software is so passé. Try to find out up front whether the system you're considering requires a big initial investment of time and dollars to configure, install, get trained on and maintain. No knock against the big, customizable matter management systems per se; they're great for 200 lawyer law departments. But if the software providers you've short listed in your search are insisting they have to camp out in your department for two or three days in order to trim their systems to your needs, then perhaps you want to keep looking for an easier system that comes ready to go out of the box. Additional day-to-day ease of use considerations that matter include: (1) easy to enter information - upload documents, import contacts and calendar events, (2) simple to assign work to people and keep track, (3) search capability that is straightforward but strong, and (4) useful gadgets such as electronic sticky notes, bookmarks, and reminders that help you pick up where you left off whenever you are interrupted.
2. **Affordable** – in these tough economic times and dwindling budgets, what really matters is a fair price. When you're looking at a system and 80% of the features are designed for medium and large law departments, it's hard to swallow the price tag when you're only going to use about 20% of the product. You want to look for a price that is within your budget and that won't shock the accounting group when they see it. What's the right price? Probably something that's more like the cost of monthly cell-phone service. Pricing *options* are important, too. Look for a system that provides monthly subscription pricing at a per/user per/month amount but that also gives discounts if you pay in advance for a 12-month commitment. Systems in the monthly price range of \$50 to \$150 per person are starting to emerge if you do the legwork to find them.

3. **Hosted/online/SaaS<sup>1</sup>/cloud computing** – no matter which of these synonyms you use, it’s important to look for a system with no downloads, no IT support needed, with updates and enhancements on-the-fly, so you’re always using the latest and greatest without having to stop and get help to install the upgrade. As busy as your schedule is, you want to look for those systems that are ready to go, day 1 and every other day after that. Cloud-based systems run within standard web browsers, so whether your team favors Firefox, Safari or Internet Explorer; PC’s, Mac’s or iPads, the same system can work for everyone. It goes without saying that you want a secure online system (see discussion below), but cloud-based systems spare you the indignity of begging your IT group for the time and resources needed to install your system in-house. Even better, you can evaluate and choose an online system without having to make sure it will run on the internal hardware and operating systems your IT group has standardized on. That said, you will want to be sure the vendor providing your cloud-based system can give you a technology white paper detailing the specifications of their hosting facility: are data backups routinely performed? Is there redundant power and data network connections? How is physical access controlled? It won’t be a real interesting read for you, but your IT group will appreciate reviewing it if they need to sign-off on your choice.
4. **Flexible** - software that adapts to your workflow, working the way you work, is vital. A key flexibility factor that distinguishes most small law departments from large ones is how they think about “process.” Large law departments *need* processes to avoid the chaos of doing things 100 different ways. But not so much for small law, where the closest thing to a formal process is flexible “checklists.” When considering a small law system, look for the ability to build checklists of tasks or to-do’s, whether for incorporating in a new state, arranging a commercial lease for the new office, or managing the quarterly board meetings. Such a system will give you the flexibility to easily re-order, re-assign or re-use the checklist as those everyday changes come along. Shy away from large law department software that can’t be deployed until you adopt processes first, just so they can be configured and enforced in the system.
5. **Email integration** – the system you select should integrate well with your primary means of receiving work... email. Who doesn’t receive assignments and projects and shopping lists from their spouse via email? We all do. So it’s worth giving serious consideration to those solutions that let you simply forward emails with attachments directly into your system as a way to automatically create to-dos and store documents. It shouldn’t matter whether it’s Outlook, Lotus Notes or other email service providers, either. In addition, email integration can be a handy way to use your system to archive the contracts, licenses, policy handbooks, and other documents that come attached to your emails.

---

<sup>1</sup> SaaS: software-as-a-service

6. **Secure** – you want to select a small law department system with strong, but multi-faceted security. First, you want secure access. This means subscribing to an online system that will not allow new users to be added to your department’s account without first requiring explicit approval from you or your designated administrator. Secondly, you want secure communication – a solution that uses strong encryption to protect all your data traffic to and from the system; 128-bit encryption at a minimum, but it’s not impossible to find even stronger 256-bit encryption in today’s small law department systems. Thirdly, you also want a product that offers the option to keep your department’s work product secure and private. Ideally, a small law department management system will work equally well for those groups that prefer an “honor system” giving everyone access to all documents, folders, and actions as well as those departments that want to restrict access to certain contracts, matters, or ticklers on a need to know basis. Finally, you should ask about secure deletion or removal of documents from the system you’re considering. With all the pluses of a hosted/online/SaaS/cloud computing system, you want to be sure and ask the provider how thoroughly and completely the documents you’ve deleted from your account are wiped away from the system storage. A warning flag should go up in your mind if you’re told that only the links to your documents are deleted – orphaning them – but the documents themselves persist.
7. **Collaborative** – your system should allow for collaboration between your legal department and other business units. Collaboration can come in many forms: shared access to information, shared assignments, and shared work product. If you rely on people throughout your company for responsibilities like contract administration and managing external partner relationships, then you will want to choose a collaborative system. Find out if the system you’re looking at permits you to restrict a user’s access solely to the matters, folders, documents and tasks they are involved in. In addition, make sure your system allows you to delegate actions and pre-program reminders for users who are outside your law department. The payoff for collaboration support is huge – getting to enlist a larger team outside your law department but using the system to keep everyone on the same page.
8. **Blackberry and iPhone support** – productivity doesn’t stay at the office, it travels with you everywhere you go. Have you ever been invited to an impromptu lunch with your CEO when you didn’t have that list of top five things you’d been saving up to discuss? Or your flight has just been delayed 90 minutes and you wish you could check on your to-do list or make some reminder phone calls rather than just delete junk email from your inbox? Choosing small law software that includes accessibility via your smart-phone might be the missing piece to help you stay as productive on the road as you are at your desk.

9. **24/7/anywhere** – the new normal for small law departments is that work requests can come at weird hours and from strange places. Flight layovers, remote offices, telecommuting all demand accessibility 24/7/anywhere and the software you choose should know that. Find out if the system you’re considering supports simple Internet access, whether using a laptop web-browser or a smart-phone. Even better is if the system has been streamlined to perform well over wireless or cellular connections that sometimes run a little slower than full broadband speeds. If you’re checking out a cloud-based system, also ask about the policy for scheduling the deployment of fixes and new features; Monday morning at 9am eastern is a lot different than midnight Saturday night.
10. **Productivity** – you know that managing small law departments is more than contract or matter management, it’s a continuous effort to stay out of overwhelm. The system you choose should keep you and your direct reports on the same page, helping you keep things from falling through the cracks. Do yourself and your admin a favor, and make sure your shopping list includes productivity requirements, like built-in task management and delegation controls. It’s helpful to look for basic tickler capability to remind you 90 days before contract renewals to change the terms and conditions you’ve been complaining about. But you may want to consider a system with more advanced features that enable delegation of assignments, and viewing workload status on a per-person, per-project, per-department, or per-timeframe basis.
11. **Way cool** – OK, so technically we went a little beyond a top 10. But we said the process of shopping for a small law department system should be fun. After all the hard selection work is over and legal teams are using their new system day in and day out, they simply want software that’s enjoyable to use. So leave a space on your product evaluation checklist to comment on the cool features that catch your eye. It may be a system’s visual look and colors, or the ability to use a cell phone link with your system to dictate new task items to your team, or the quirky YouTube training videos your vendor continually creates to help you enjoy your system. Whatever it is, the more you can make your system fun and cool, the more likely you are to want to use it daily and reap the full benefit of all your labor. Good luck!