

Selecting the ideal law practice management software for your firm can be overwhelming. Should you opt for a cloud-based or on-premises solution? How do the costs vary among different software options? What key questions should you ask the software vendor?

### **Here are things to consider when selecting practice management software for your firm:**

#### **Understand the difference between cloud-based and on-premises software.**

- On-premises software is the traditional model, where each staff member installs the software on their computer, and data is stored locally. To share and back up data, firms use a central file server within the office, and remote access requires a VPN.
- Cloud-based software, or software as a service (SaaS), is accessed through a web browser and stores data in the vendor's database. This allows staff to access the software from any location with an internet connection, offering benefits in setup, maintenance, compatibility, usability, and security.

#### **Consider the differences in cost and maintenance.**

- On-premises software involves high upfront costs for licenses and setup, often requiring an IT specialist. Annual maintenance fees are common, and hidden costs can add up over time. Updates and security patches require regular attention, and major revisions usually necessitate repurchasing licenses and possibly upgrading hardware. Troubleshooting can be complex and time-consuming, often involving multiple vendors.
- Cloud-based software typically uses a subscription model, with predictable monthly or annual costs. Maintenance, security, and updates are handled by the provider, ensuring minimal disruption to operations. It runs through a web browser, reducing compatibility issues with other office technologies, and any problems are quickly addressed by the provider.

#### **Ensure you can access your information when you need to, even remotely.**

- Legal work happens everywhere—not just in the office. Cloud-based software lets you log in from anywhere with an internet connection. Some also offer mobile apps for phones and tablets, allowing lawyers to access and manage information on the go, which is crucial for lawyers working remotely.

#### **Make sure your software is compatible with your existing systems.**

- Law firms use various technologies for tasks like word processing, email, calendaring, and bookkeeping. Your practice management software should integrate with these tools to avoid manual data entry, ensuring efficiency and accuracy. Compatibility also allows flexibility to adopt new tools as needed.

#### **Consider ease of migration, integration, and staff training.**

- The right software should be easy to use and integrate with your existing workflow. It should minimize disruption during the transition and offer comprehensive training and support. Cloud-based systems often feature modern, user-friendly interfaces and are compatible across different operating systems and devices, making them easier to adopt and use effectively.

## Questions to Ask a Legal Practice Management Software Vendor Before Purchasing

- ✓ **Is the software completely cloud-based?**  
Some solutions require additional applications for certain functions. Confirm the technical requirements for using their software.
- ✓ **Are the vendor's security and data redundancy policies sufficient?**  
Understand how the vendor protects your client data to ensure it meets your security standards.
- ✓ **How can we import and export our data?**  
Discuss data migration capabilities with the sales representative to understand how your current data can be imported and how data can be exported if needed.
- ✓ **What integrations are required to use the features shown in the demo?**  
After the demo, clarify the costs and requirements of all demonstrated features and integrations.
- ✓ **How do you handle [specific process] in your software?**  
Before the demo, list your firm's specific needs and processes. Ask the vendor to demonstrate how their software handles each one, rather than just telling you it can be done.

### Buyer's Guide

| TYPE                           | PRODUCTS   |
|--------------------------------|--|
| Accounting                     | <a href="#">Nota by M&amp;T Bank</a> **<br><a href="#">Tabs3</a> **<br><a href="#">TrustBooks</a> **   |
| Background Checks              | <a href="#">DATACHECK</a><br><a href="#">LexisNexis – Public Records Search</a><br><a href="#">TransUnion TLOxp</a><br><a href="#">Vertical Screen</a> |
| Brief Review/Citation Checking | <a href="#">Casetext</a><br><a href="#">ezBriefs by Benchly</a> **<br><a href="#">v lex FastCase</a> ** (FREE - access through the member portal)      |
| Business Valuation             | <a href="#">Trugman Valuation</a>  |
| Chatbots                       | <a href="#">Josef</a><br><a href="#">LawDroid</a>  |
| Coaching                       | <a href="#">Atticus</a><br><a href="#">Affinity Consulting</a><br><a href="#">Lawcountability</a> **   |
| Contract Lifecycle Management  | <a href="#">ContractCrab</a><br><a href="#">Filevine</a><br><a href="#">Juridoc</a>  |
| Court Rules/Calendaring        | <a href="#">LawToolBox</a>   |
| Credit Card Processing         | <a href="#">LawPay</a> **  |
| Document Management            | <a href="#">NetDocuments</a> **<br><a href="#">Pipe File</a>   |
| E-Filing                       | <a href="#">eFileMadeEasy</a>  |
| e-Discovery                    | <a href="#">CaseFleet</a><br><a href="#">Discovery Genie</a><br><a href="#">Indexed I/O Electronic Discovery</a> **<br><a href="#">Nextpoint</a> **    |
| E-Mail Management/Encryption   | <a href="#">NetDocuments</a> **<br><a href="#">RMail by RPost</a> **<br><a href="#">Trustifi</a>   |
| Electronic Signature           | <a href="#">RSign by RPost</a> **<br><a href="#">Secured Signing</a>   |
| File Storage                   | <a href="#">AXEL GO</a> **   |
| Financial Services             | <a href="#">bhgfinancial</a> **<br><a href="#">Prudent Financial Planning</a> **<br><a href="#">Savi</a> **<br><a href="#">SoFi</a> **                 |

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|--|--|
| <b>Fixed Pricing</b>   | <a href="#">AltFee</a>   |
| <b>Form Builder</b>  | <a href="#">FormsPass Legal Forms Library**</a><br><a href="#">TheFormTool**</a><br><a href="#">Thomson Reuters Westlaw – Form Builder**</a>   |
| <b>Graphics Software</b>   | <a href="#">smartdraw**</a>  |
| <b>Health Insurance</b>  | <a href="#">Member Benefits Inc**</a>  |
| <b>Image Preservation [webpages, websites, social media, videos, images]</b> | <a href="#">Page Vault**</a>   |
| <b>Legal Office Management Assessment</b>                                    | <a href="#">Procertas**</a>  |
| <b>Legal Research</b>  | <a href="#">ESAS**</a><br><a href="#">v lex FastCase**</a> (FREE - access through the member portal)<br><a href="#">Tracers**</a><br><a href="#">UniCourt**</a>  |
| <b>Managed IT/Cybersecurity Services</b>                                     | <a href="#">Accellis</a><br><a href="#">GlobalGuard IT</a><br><a href="#">Coaxis International**</a><br><a href="#">Sensei Enterprises</a><br><a href="#">TabushGroup</a>  |
| <b>Marketing</b>   | <a href="#">360 BIZVUE**</a><br><a href="#">Digital Age Marketing Group</a><br><a href="#">Omnizant**</a><br><a href="#">PaperStreet**</a><br><a href="#">Practice42**</a><br><a href="#">TheLaw.TV</a><br><a href="#">USAttorneys**</a> |
| <b>Notarization</b>  | <a href="#">BlueNotary</a><br><a href="#">Secured Signing</a>  |
| <b>Payroll Processing</b>  | <a href="#">Paychex</a><br><a href="#">SurePayroll</a>   |
| <b>Practice Management Systems (complete)</b>                                | <a href="#">Caret Legal</a><br><a href="#">Clio**</a><br><a href="#">CosmoLex**</a><br><a href="#">MyCase**</a><br><a href="#">Practice Panther**</a><br><a href="#">Rocket Matter**</a><br><a href="#">Smokeball**</a>                  |
| <b>Process Server Management</b>   | <a href="#">ServeManager**</a>   |
| <b>Professional Liability Insurance/Broker</b>                               | <a href="#">ABA list of carriers in Florida</a><br><a href="#">Florida Lawyers Mutual Insurance Co. (FLMIC)**</a><br><a href="#">Kouwenhoven &amp; Associates, Inc.</a>  |
| <b>Publications</b>  | <a href="#">LAW.COM**</a><br><a href="#">Legal Publications of The Florida Bar**</a><br><a href="#">Wolters Kluwer**</a>   |
| <b>Scanning</b>  | <a href="#">ScanSnap</a>   |
| <b>Staffing</b>  | <a href="#">Florida Bar Career Center</a><br><a href="#">LawSprt**</a>   |
| <b>Student Loan Refinancing</b>  | <a href="#">Prudent Financial Planning**</a><br><a href="#">SoFi**</a>   |
| <b>Telephone Services</b>  | <a href="#">Ruby Receptionists**</a><br><a href="#">Smith.ai**</a>   |
| <b>Timekeeping</b>   | <a href="#">Time Miner**</a><br><a href="#">TimeSolv**</a>   |
| <b>Translation Services</b>  | <a href="#">Horizon Legal Solutions**</a>  |

\*\* = [Florida Bar Member Benefit](#)

The Buyer's Guide is not an exhaustive list of products and services and does not serve as a recommended list. Members are advised to perform their own research before making any selections.