

**BEST PRACTICE PLAYBOOK**

# In-House Legal Team's Guide To Buying Legal Technology



# Introduction

Buying new software or technology solutions is challenging.

For most of us, this is an area we rarely encounter in our careers, making it unfamiliar and outside our comfort zone. Plus, the buying process is complex and can involve a sizeable chunk of your budget. Everyone wants to have a say, but no one wants to be responsible, and there are so many internal hurdles.

For some legal teams, it can all seem too much, and you may find the best solution is to engage a consultant. However, much can be learned through retaining this project in-house, and in many cases, this can provide an outcome that is more aligned with organisation goals and results in greater adoption by an engaged legal team.

This playbook is designed to help guide legal professionals through the process of buying legal technology. Based on years of experience working with corporate and Government legal teams, it will share a straightforward, best-practice approach.



# Defining Your Objectives

If your legal team has decided to venture down the path of buying legal technology software or solutions, congratulations!

You and your team might be excited at the idea of buying something new but **do not** be tempted to rush into the buying process.

Buying, implementing and adopting new technology solutions can very quickly go sideways and result in frustration and wasted resources and can create considerable risk.

The goal is always to get it right the first time. Slowing down at the beginning and getting the planning and objective setting right will ultimately accelerate the time it takes to achieve the best outcome.

“ Remember: Don't rush the planning phase  
– by slowing it down you will speed it up.



## Identify Pain Points

Start by conducting a thorough assessment of your current workflows and processes. Identify tasks that are repetitive, time-consuming, or prone to errors. Understanding these pain points will help you determine what specific problems the new technology needs to solve.

## Set Goals

Clearly outline what you want to achieve. Whether it's improving efficiency, ensuring compliance, or enhancing collaboration, having clear goals will guide your decision-making process.

## Evaluate Current Systems

Take a comprehensive look at your existing technology stack. Determine what systems are currently in place and evaluate their effectiveness. This assessment will help you decide whether you need a solution that integrates with your existing systems or one that can replace them entirely.

## Define Functional Requirements

Based on your goals and pain points, create a list of functional requirements that the new technology must meet. Match the requirements with “user stories” to describe how something will be used in real life. This list will serve as a benchmark when evaluating potential solutions.



Before you begin exploring the market, it's crucial to define what you aim to achieve with the legal technology solution. Consider what tasks are consuming most of your team's time and whether they can be automated. Evaluate your current systems and determine if the new technology needs to integrate with them or replace them entirely. Your objectives will be the foundation for identifying the functionalities your ideal solution must possess.

“ Explore Lawcadia’s helpful resources including a sample requirements document - see page 16.

# Involving Stakeholders

Legal technology impacts more than just the legal department. Engage stakeholders from various departments, including business partners, IT experts, procurement teams, and executive leadership. Their insights can highlight needed features and integration points with existing systems, and their experiences with past technology implementations can guide the approval process.

You must also uncover and identify if there are any specific gates and milestones for new technology projects, such as budget reviews, information security reviews, and procurement thresholds.



**Identify Key Stakeholders:** Determine who within your organisation will be affected by the new technology.

**Gather Input:** Host meetings or workshops with stakeholders to gather their input and understand their needs and concerns.

**Align Goals:** Ensure that the legal department's goals align with the organisation's overall objectives. This alignment will help secure buy-in from executive leadership and other key stakeholders.

**Learn From Past Implementations:** Leverage the experiences of stakeholders who have been involved in previous technology implementations. Their insights can help you anticipate potential challenges and avoid common pitfalls.

# Market Scanning

Don't start the market scan process until you've ticked all of these off:

1. Draft functional requirements - what the technology must do, what it should do, and what would be nice to have, along with user stories
2. Draft non-functional requirements - the security and technical mandates
3. You don't necessarily have to have a budget allocated, but you must know how to get resources approved, if a business case is required, and if there are additional constraints

Conduct a comprehensive market scan and identify a list of possible vendors that can meet your criteria. Examine options for functionality, ease of use, scalability, and customer case studies. Assess each solution's alignment with your specific needs and long-term objectives.

If you aren't sure what vendors are in the market, you can try:

- Asking colleagues in the industry
- Conducting an internet search

Some tech directories are available, but these can be skewed to a particular region and may only showcase vendors that pay to be included. The old-fashioned approach of asking around and using a quality internet search engine can still provide great results.



“ Don't start the market scan until you have draft requirements and know how, when, and what is required to get the budget.

## Research Vendors

Start by identifying potential vendors that offer solutions tailored to the legal industry. Look for vendors with a strong track record and positive customer testimonials.

## Evaluate Features

Review the vendor's websites and marketing materials and compare the features and benefits to your requirements at a high level. Pay attention to features that are essential for your organisation's needs.

## Assess Usability

A user-friendly interface can enhance adoption, so try to view and access short videos or screenshots of the software where possible.

## Consider Scalability

Consider a solution that can grow with your organisation. While a point solution might solve your immediate pain point, does it have the flexibility to solve future pain points?

## Review Case Studies

Look for customer case studies and testimonials to understand how other organisations have benefited from the solution. This can provide insights into the technology's real-world performance and reliability.



While pricing is important, it should not play a key role in the market scan. Buying legal technology is usually a moderately complex B2B (business-to-business) transaction, and as such, many legal technology vendors will not have pricing available to the public. However, it is helpful to understand how the vendors price their solution (subscription, user-based, etc.) and make notes on this.

“ *The old-fashioned approach of asking around and using a quality internet search engine can still provide great results.* ”

# Initial Demonstrations

From your market research, shortlist 3-5 options that most closely meet your requirements. Request tailored demonstrations from these vendors to get a hands-on experience of their products. These demos are essential for understanding each platform's unique value proposition and the vendor's expertise with similar clients.



**Create A Shortlist:** Based on your market survey, narrow down your options to a shortlist of 3-5 vendors that best meet your criteria. This will make the evaluation process more manageable.

**Request Demos:** Contact the shortlisted vendors and request tailored demonstrations of their products. Ensure that the demos are customised to your specific user stories and workflows.

**Prepare For Demos:** Prepare a list of questions and scenarios you want the vendors to address. This will help you evaluate how well their solutions meet your requirements.

**Evaluate:** During the demos, assess the usability, functionality, and overall fit of each solution. Pay attention to how well the vendors understand your needs and their ability to address your pain points.

**Gather Feedback:** Involve key stakeholders in the demo sessions and gather their feedback. Their input can provide valuable perspectives on the strengths and weaknesses of each solution.

**Request Pricing:** Request a formal proposal that outlines the commercial arrangements for your specific use cases and requirements, including implementation and all ongoing costs.



# Evaluating Solutions

This is the hardest part but also the most important.

You've seen demonstrations from at least three vendors, and now you will need to get into the details of evaluation and determining which vendor best meets your requirements.

## Some Key Steps To Consider

Depending on the scale of your legal technology implementation, you may want to dial this down or dial it up. There is no right or wrong path forward; it is simply additional considerations and conversations to inform the evaluation process.



**Short-list Again:** Based on the initial demonstrations and pricing proposals received, you should focus on no more than two vendors.

**Deep Dive Demonstrations:** There is absolutely no way that you will have seen everything the legal technology can, should or will be able to do in that initial demonstration. It is essential to have a second, or even a third, deep dive demonstration where you ask critical questions and get a good understanding of the user experience, the ease of use, and how easy or hard it will be to configure and adapt to your use cases.

**Clarify Support And Implementation:** Good customer support can significantly impact the success of your implementation and adoption. Each vendor will have a different approach to customer support, how they run implementations, and the effort and resources necessary from the legal team and your IT colleagues. You want to avoid surprises, so dig into this detail to clarify what would be required to implement each solution from the external investment perspective and the internal resources required.

**Validate Security And Compliance:** Ensuring a vendor's security and compliance standards meet your requirements is crucial. Ask each vendor to provide a detailed information security overview or information pack. While detailed security questionnaires will need to be completed before finalising contracts, you are not there yet. Most vendors will have these information packs readily available, which you can share with your IT team to confirm there are no red flags.

**Test-Drive:** Some vendors may be able to provide a trial period or a sandbox environment where you can 'test-drive' the platform and explore how it works as part of your evaluation. This is an optional part of the buying process, and there are pros and cons to including this in the evaluation stage. The positive is that it allows you to experiment and use the technology. However, there are some downsides to be aware of. Firstly, it requires a commitment of time from you and members of your legal team, as well as commitment from the vendor. Secondly, how you are testing or using the technology may not reflect how it will be used in real life, so it may not be an entirely valid evaluation.

**Speak With Reference Clients:** This is an opportunity to speak with other legal teams who have successfully implemented the solution. The vendor should have a couple of happy clients with whom they can connect you to have a conversation. This will give you confidence in the vendor and will greatly inform the decision-making.



# Making the Decision

Up to this point, you've invested a lot of time exploring, researching and considering the strategic options and the solutions available in the market.

The process of making the decision involves documenting and synthesising your findings and comparing them against your initial objectives. Consult your stakeholders again before making the final decision. Finally, you may need to prepare and consider the return on investment and craft a business case.



**Summarise Findings:** Compile all the information gathered during the evaluation process. Summarise the strengths and weaknesses of each solution and how well they align with your objectives.

**Compare Against Objectives:** Compare each solution against the objectives you defined earlier. Assess how well each option meets your functional requirements, addresses your pain points, and supports your goals.

**Calculate ROI:** Consider the return on investment for each solution. Evaluate the potential benefits, such as increased efficiency, cost savings, and improved compliance, against the total cost of ownership.

**Consult Stakeholders:** Share your findings with key stakeholders and gather their input. Their perspectives can help you make a more informed decision and ensure that the chosen solution has organisational support.

**Make The Final Decision:** Based on your findings and stakeholder input, select the solution that best meets your needs. Ensure that the chosen solution aligns with your objectives, provides value for money, and has the support of key stakeholders.

# Security Review And Contract Negotiations

Congratulations! If you have come this far, you have already achieved a lot: You have defined your objectives, chosen a solution, achieved budget approval, received stakeholder input, and are now ready to implement. But first, you must formalise the technology purchase with a final security review and agree on contract terms.

This can be a tricky time to navigate as everyone in the team, including the General Counsel, wants to start the implementation as soon as possible. While it is tempting to push ahead with the implementation in tandem, a cautious and practical approach is recommended for a few reasons.

Firstly, technology projects can fall over at this final stage, and it can take a lot of work to extricate a project halfway through. Secondly, the implementation and infrastructure parameters can still evolve as technical experts discuss technology infrastructure, data security, data processing, privacy, IP, and many other essential aspects. Finally, while contract negotiations should be straightforward, some sticking points may need time and discussion to overcome. In summary, try to move security review and contract negotiations forward as quickly as possible, but don't cut corners.



# Implementation And Beyond

Once you've selected a solution, gone through the final security review and contract negotiations, plan for a smooth implementation. Ensure that your team is trained and that the transition is as seamless as possible. After implementation, continuously monitor the solution's performance and be open to making adjustments as needed.



**Create an Implementation Plan:** Develop a detailed implementation plan that outlines the steps, timelines, and responsibilities for deploying the new technology. Ensure that the plan includes provisions for data migration, system integration, and user training. Maintain open communication channels and have weekly meetings with the vendor.

**Train Your Team:** Ensure that your team is trained on the new technology. Provide comprehensive training resources, including manuals, video tutorials, and hands-on training sessions. This will help ensure a smooth transition and high adoption rates.

**Ensure Seamless Transition:** Minimise disruption to your operations by carefully planning the transition process. This may include running parallel systems for a period, providing additional support during the initial stages, and addressing any issues promptly.

**Monitor Performance:** Continuously monitor the performance of the new technology to ensure that it meets your expectations. Track key metrics, gather user feedback, and be open to making adjustments as needed.

**Continuous Improvement:** Stay updated on new features and updates offered by the vendor. Regularly review your use of the technology and identify opportunities for improvement. Continuous improvement will help you maximise the value of your investment.

“ *Maintain open communications channels and have weekly meetings with the vendor.* ”

# The Takeaway

Purchasing legal technology is a complex process that can be daunting, especially since it is unfamiliar territory for many legal professionals. This playbook provides a straightforward, step-by-step approach to help guide legal teams through this process, from defining objectives and involving stakeholders to conducting a market scan, evaluating solutions, and making the final decision. By following the recommended strategies, legal teams can avoid common pitfalls, ensure that the chosen solution aligns with their goals, and achieve a smoother implementation and higher adoption rates.

The playbook emphasises the importance of thorough planning and stakeholder engagement to ensure that the technology selected meets both the legal team's needs and the broader organisational objectives. It also highlights the critical role of continuous evaluation and improvement post-implementation, ensuring that the technology remains effective and delivers long-term value.

By adhering to the guidelines in this playbook, legal teams can navigate the complexities of technology procurement with greater confidence and clarity, ultimately leading to more successful outcomes.



# Resources And Templates

Lawcadia has a breadth of helpful resources including guides and templates to help you through the buying process and enhance your legal operations. You can access these through the Resources section on Lawcadia's website and through these links below.



[Sample Functional Requirements](#)

[Lawcadia's Savings Calculator](#)

[Crafting a Compelling Business Case](#)

[How to Calculate ROI for Legal Tech](#)

[Developing a Legal Department Strategy](#)

[The 8 Principles of Effective Outside Counsel Management](#)

# About Lawcadia

Lawcadia is an award-winning, end-to-end legal operations platform for high-performing in-house legal teams. A unique two-sided platform with an intelligent automation engine, Lawcadia transforms the way in-house legal teams collaborate with internal stakeholders and law firms to solve business problems.

In-house legal teams benefit from structured intake and triage, streamlined workflows, accurate instructions, enhanced invoicing and eBilling, greater control of budgets and law firm engagements, as well as optimised document, email, and matter management. Plus, configurable metrics and dashboards clearly demonstrate the legal function's value within the organisation.

The platform is designed and built to comply with the most stringent global security standards, including the information security requirements of Government departments and banks.

“ *Lawcadia is your strategic partner - empowering, supporting, and amplifying your legal team.* ”

[Learn more](#)



## The Author

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With an extensive background in marketing, innovation, design thinking and entrepreneurship, Sacha is an advocate for legal technology and women in leadership.

Sacha is passionate about transformation in the legal industry and applies creative thinking processes, strategy, and design thinking to identifying pain points and developing innovative solutions.

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