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Questions to Ask When Considering Legal Case Management Software



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Adopting a new legal case management platform is a significant undertaking that has the potential to transform your firm. However, such a decision requires careful consideration and planning. Clearly understanding your goals and envisioning your desired future state are essential for making the best choice. This guide outlines key foundational questions to help you define your objectives and create a blueprint to guide your research and decision-making process.

“Why” questions are often the most helpful, especially when kicking off your research.

Why Do You Want Legal Case Management Software?

Due diligence, as every legal professional knows, is critical to a successful outcome. The very first research you should conduct is with stakeholders who first suggested the idea of getting legal case management software. If that’s you, it’s easy as taking 10 minutes to consider why you want case management software.

The Five Why’s

This exercise can be even more effective by using the “Five Why’s” framework. This framework helps you to get to the root of your problem—and the solution (surprise!) may not be new case management software.

For example:

Q: Why do I want case management software?

A: I want my office to run more efficiently.

Q: Why do you want your office to run more efficiently?

A: To improve my bottom line and make my staff less stressed.

Q: Why do you want to improve your bottom line and decrease your staff’s stress level?

A: Because I want to be able to pay my staff more and improve morale

Q: Why do you want to be able to pay staff more and improve morale?

A: To lower my staff turnover rate.

Q: Why do you want to lower your staff turnover rate?

A: Because it’s hard to find good people and it disrupts workflows when I have to train new people and my clients don’t work consistently with the same people.

Revisit the core question: Why do I want new case management software? The answer: To reduce staff turnover, maintain consistent workflows, minimize training time, and provide clients with the stability of working with the same team over time.

Will getting new legal case management software help you achieve this? Is your existing case management software accelerating staff turnover? If your existing platform is clearly a factor influencing high staff turnover (perhaps they are constantly frustrated with bottlenecks or outdated workarounds or the inability to work from home), then upgrading your system makes perfect sense.

However, perhaps there are other factors at play that have nothing to do with your existing case management software, and switching platforms will have, at best, a minimal positive effect and at worst, increase turnover because they must learn a new application (which is never fun).

Defining the Problem

If the Five Why's method feels overwhelming, simply define the problem you're trying to solve and evaluate whether a new case management platform can address it.

Perhaps you've heard from a colleague in the field about a case management platform that was doing "wonders" for their firm. If your reason for wanting new case management software is "Because Firm X is benefiting and I don't want to get 'left behind'," ask yourself, is the current way your firm is operating going lead to "falling behind"? What, exactly, does "falling behind" mean?

Aim to identify concrete ways in which you might be "falling behind" with your current system. Perhaps Firm X is leveraging artificial intelligence or automation to decrease demands on staff time but still deliver exemplary case outcomes. Maybe you're planning to scale your firm over the next five years, but difficulty finding talent in your area makes a cloud-based legal case management platform a necessary solution.

Identifying key areas where you feel your firm could do better to match the competition will allow you to determine if a new case management platform will resolve those concerns. Both of the previous examples can be addressed with cutting-edge legal case management software.

How is My Current System Not Meeting My Needs?

Clearly identifying the shortcomings of your current system will help you pinpoint the capabilities your new case management platform must have. By thoroughly analyzing what isn't working for your firm, you'll be in a stronger position to select a platform that meets your needs and avoids disappointment if the new software doesn't deliver the improvements you expected.

This process might even reveal that your current system is adequate and that other aspects of your operations need adjustment instead. The goal is to precisely identify what improvements your firm requires. If you conclude that your current system falls short, you'll have a solid foundation for defining the requirements of your new case management platform.

Alternatively, you can try envisioning what life looks like with the ideal case management platform and comparing it with your current day-to-day operations. If, upon comparison, the two are very similar, you might not need to invest in something new.

What Are My Legal Case Management Requirements?

After completing at least one of the exercises in the previous step you should have a solid idea of the problem(s) you are trying to solve with a new case management platform. This will inform your requirements for a new system. In this instance, a requirement does not have to be a feature. In fact, it's beneficial to avoid feature listing if possible because each case management platform may have a different way of supporting a requirement.

A requirement could be something like "allows my firm to work from anywhere" or "allows me to predict my cash flow based on cases in the settlement stage." Notice that these are not features. Defining requirements without focusing on specific features ensures you don't unintentionally rule out platforms that could meet your needs in a different but equally effective way.

Keep in mind that it's unlikely a single system will satisfy every one of your product requirements (unless you have a fairly short list). Each firm has unique needs, and there are only so many legal case management platforms. The key is getting one that is the right fit for your firm and solves your most pressing challenges while supporting your most critical future goals.

Therefore, it is helpful to prioritize your requirements in the event a singular platform cannot satisfy them all. As the Rolling Stones say, "You can't always get what you want, but you get what you need!"

Try dividing your requirements into “Must-have” and “Nice to have” categories. This will help you easily eliminate potential case management platforms that don’t meet your core needs but may have flashy bells and whistles that are “nice to have.” Once you have your list, get input from other stakeholders, ideally one person from each department who will be using the software. You may find that your “nice to have” is a “must-have” for someone else.

What is a Legal Case Management Platform Worth to My Firm?

Perhaps you have a budget in mind for legal case management software; perhaps not. But before you determine your final budget for a platform, consider the following:

Will a New Legal Case Management Platform Save Me Money?

If you’re paying for server maintenance and an IT department or third-party solution to manage your IT needs, moving to a cloud-based legal case management platform will eliminate those costs. You may still need an IT resource, but their job will be significantly easier and less costly for you. Not to mention, if you decide to go completely remote or hybrid, you can downsize your office space or close it all together, saving you money on rent and utilities.

Consider what you’re paying your current legal staff and how long it takes for them to complete workflows or legal tasks. If you can decrease the labor but still retain the same output, you can either take on more cases with the same staff or slim down your current staff and maintain your current caseload. Legal case management platforms can help you make your staff more productive by automating workflows, decreasing the time it takes to generate documents and input data, cutting down on time wasted searching for documents, and more.

It’s no secret that you and your staff are more productive when you can stay focused. However, interruptions are inevitable during a busy day—whether it’s a client phone call, needing to track down information about a case, switching between applications to complete a task, or other distractions. Each interruption forces you to shift gears and then reorient yourself with the original task, draining your mental energy and wasting valuable time.

A case management platform can help eliminate many of these interruptions. For example, if a client is calling for an update on her case, automated updates from legal case management software can provide her with the information she needs, eliminating the need for the call. Additionally, most case management platforms integrate seamlessly with common legal applications, such as accounting software and calendaring tools. These integrations save time in two key ways: you don’t need to switch mental gears to operate a different system, and you can trust the data’s accuracy since the systems are interconnected.

What Keeps You Up at Night?

Sometimes, "worth" isn't just about financials—it's also about your stress levels and job satisfaction. Consider your biggest concerns about your firm's future. Are you worried about data security and protecting sensitive client information from cyberattacks? Or perhaps you fear missing a critical deadline, forgetting to double-check an important document, or losing thousands due to an oversight when you're unable to access the office. Maybe you're concerned about employee turnover and the challenge of finding and training new staff.

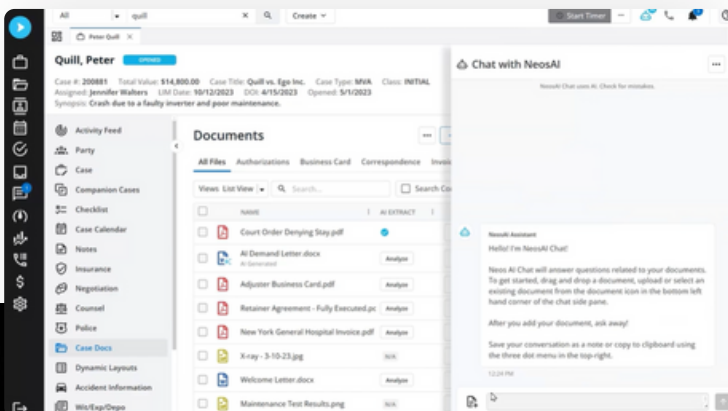
Share these concerns with the vendors you're considering for legal case management software. While it's not a cure-all, the right solution can address many of these issues. For instance, a cloud-based platform gives you access to your firm's data and case activities from anywhere, even on your phone at 4 AM, providing peace of mind. A reputable solution also offers robust security measures far superior to an on-site server.

If a case management platform can reduce your stress and improve your daily work experience, its value goes far beyond dollars and cents—it can truly be invaluable.

The Path to Your Ideal Legal Case Management Platform

Choosing the right legal case management platform is a significant decision, but with thoughtful consideration and clear objectives, it can transform the way your firm operates. By identifying your needs, defining your requirements, and assessing the impact a new platform can have on your workflow, efficiency, and bottom line, you'll be well-prepared to make the best choice for your firm.

Remember, this process isn't just about adopting new technology; it's about solving real challenges and positioning your firm for success in the years ahead. Take the time to ask the hard questions, prioritize your needs, and engage with vendors to find a solution that aligns with your goals. With the right case management platform, your firm can streamline operations, reduce interruptions, and focus on what matters most—delivering exceptional outcomes for your clients.



If your firm would like to learn more about Neos case management by Assembly Software, contact us at sales@assemblysoftware.com

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