LEGAL TECHNOLOGY PROCESS MAP

THIS PROCESS MAP IS INTENDED TO GUIDE YOU THROUGH THE SCOPING, SELECTION AND IMPLEMENTATION OF LEGAL TECHNOLOGY

HOW WE CAN HELP

• Guidance throughout the technology buying or building processes to give you clarity and confidence in your decisions and ensure successful implementations
• Use of our proprietary Legal Project Management technology
• Access to our in-house team of legal technology professionals

SCOPE

Define your needs and goals.
• What problem are you trying to solve?
• What process are you trying to promote?
• Who are your primary end users? If attorneys, it needs to be simple.

Identify the appropriate technology based on your goals and needs.

Seek input from the primary end users and stakeholders to ensure buy-in and user adoption.
• What are their perspectives and experiences?
• What is essential, and what is a nice-to-have?
• How should the technology be tailored to fit into existing processes?

Seek requirements from the IT department.

Develop a technology sourcing strategy.

Communicate plan to internal stakeholders.

SELECTION

Develop an initial cost estimate.
• What are the annual licensing and maintenance fees?
• How much are the modifications required to meet your requirements?
• How much time and resources will the implementation, onboarding, and support require of your internal team?
• Is ongoing support required, and if so, how much will it cost?

Develop an RFP.

Identify a list of vendors and distribute RFP.

Set up demos with a select group of vendors.
• Which vendors offer “best-in-class” solutions?
• Which internal stakeholders and end users should be included in the demos?
• What functionality is key for vendors to focus on during demos?

Set up a trial of the technology.

Select a final vendor.

Determine required modifications and final details with the vendor.
• What is the implementation or development timeline?
• What will be the availability of the implementation or development team?
• How will modifications and enhancements be addressed?
• What is the potential for variance?
• What is the term of the license agreement?
• What are the annual maintenance requirements?

IMPLEMENTATION

Work with IT and the vendor to identify necessary integration and data importing requirements.

Develop an ongoing data management strategy.

Announce the technology internally.

Identify roadblocks to adoption.
• What information and training needs to be provided?
• What challenges or issues are end users experiencing?

Work with the vendor to troubleshoot issues.

TIP: DOCUMENT ANY FUNCTIONALITY DESCRIBED BY VENDORS AS “IN DEVELOPMENT.”

FOR MORE INFORMATION, PLEASE CONTACT:
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