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Tips for Building a Requirements List for Your Next Legal Software

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Buying legal technology can go one of two ways: your firm ends up with great software that fits your needs or a week after go-live you come to find that you've made a huge mistake.

In, How to Begin Evaluating New Technology, we discussed how to collect and categorize your firm's feedback. The next step your firm should take is to create a requirements list.

When you begin this process, one thing that is very important to note is that you should not commoditize your practice management system. Making an exhaustive requirements list can sometimes move you in that direction, but the real goal of your list is to make sure you're not missing any features you need. The purpose of this list is to use what you have created as a guideline for what your firm must have (versus pitting staff with opposing opinions against one another).

Avoid the Trap

If you carry a mindset that every feature is equal and all practice management systems are the same, you're going to be really disappointed.

Avoid the feature comparison trap by thinking about the direction your firm is going. Ask yourself: What do I want my practice to look like in 5–10 years? How do I want my interpersonal relationships with my staff to be?

Building Your List

The easiest way to start building your requirements list is to bullet out every possible feature that a practice management software could have and then begin crossing off the things you don’t need.

Additionally, you should be visiting sites like Capterra to evaluate the customer reviews for the software options you’re considering. Reviews can provide you with a snapshot of customers’ sentiment, but don’t look to them as a shortcut to making a final decision; rather, use reviews to find ideas or read comments about topics or problems that you haven’t thought of already. They are a great knowledge bank for you to tap into in order to form your own opinions.

Many reviews at sites like Capterra will talk about specific shortcomings (e.g., “It didn’t bring our history over so we can’t do compensation reports.”). Feedback from third parties who have already used the software can often prove to be just as useful as feedback from your team.

Additionally, if you’re part of the Association of Legal Administrators or any other professional communities, take advantage of their forums by asking questions like, "What is something you wish you had asked or knew ahead of time prior to buying new legal Software?"

Based on what you learn, adjust your requirements list accordingly.

What You Should and Should Not Do with Your List

Be aware that one of the worst things you could do for yourself is to ask a vendor to fill out the requirements list for you.

Instead, you need to have that list readily available and in front of you before a live demo. What happens if you pass your list off to a vendor is two-fold. First, you’ve commoditized the software and, second, you’re letting them check things off for you. When you get on a demo, you want to be shown the features that are important to you and you want to see how they work so that you can determine whether or not the software will align with your process.

For example, a vendor may say its software includes origination tracking functionality, but that does not mean its origination tracking feature will match your firm’s needs.

It is crucial that you go through the checklist yourself and mark what you deem as sufficient versus allowing someone else to mark what they think you need. No one knows your firm or your processes better than you do, so don’t overlook these details!

Of course, it is fine to send your vendors your list ahead of time in order to alert them to the features you want; after all, you want to make sure the demo is a good use of your time – but you don’t want them to check those boxes for you.

The Takeaway

The worst thing you can do for yourself is to come into this process blind. After having spoken with your team, build out a list of features or capabilities you already know you need. If you have are drawing blanks, that's okay! Read through review sites, do some homework, and take a deep breath! There are no wrong answers, this step is simply to help you stay as organized and on top of the process as possible. You can't predict everything, but preparedness is the best way to avoid miscommunication and hurt expectations.

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