

Legal Case Management Software: Vendor Evaluation Checklist

Choosing a legal case management system is a high-stakes decision. Before you commit to any platform, it's critical to ask the right questions. Use this checklist during your vendor evaluation process to uncover key insights and find a partner that can grow with your firm.

☐ Security

- What security precautions do you have in place to protect my data?
- Do you offer two-factor authentication and single sign-on (SSO)?
- What permission and access controls are available?
- Do you have internal security training or guidance for clients?

☐ Customer References

- What do current clients say about their experience?
- What would they change about the platform?
- Do they find the Support team helpful and responsive?

☐ Data Migration & Onboarding

- How do you handle data conversion and document migration?
- What's the process and timeline for going live?
- Do you use in-house or third-party transition teams?
- Is there a sandbox environment for training before go-live?

☐ Growing Your Firm

- How does your platform support firms as they grow in size and complexity? (E.g., more users, more cases, more practice areas)
- Are there any limits on the number of users, cases, or documents the system can handle?
- Can we customize workflows, permissions, and reporting as our processes evolve?
- Are there additional costs or technical limitations tied to scaling up (especially when it comes to document storage)?

☐ Product Development

- How do you incorporate customer feedback into your software?
- Can you give examples of features added because of customer input?
- How many new features do you add each year?
- How are customers notified about updates and new features?

☐ Training & Resources

- What type of training do you offer during onboarding?
- Do you provide ongoing education or live training sessions?
- Is there a searchable knowledge base or help center?
- Are help resources updated regularly to match product updates?

☐ Customer Support

- Is your customer support team in-house or outsourced?
- What support channels are available (phone, email, chat)?
- What is your average response and resolution time?
- What is the retention rate of your support staff?

☐ Artificial Intelligence

- Will any of our data be used to train your models?
- Is our data ever pooled with data from other customers or sources?
- Do you use third-party AI models or services (e.g., OpenAI, Anthropic, etc.)? If so, how is data shared and protected?
- Can you confirm that our data will not be accessed by your employees or contractors unless explicitly authorized by us?
- Can AI features be toggled off or limited by user role or permission settings?
- How do you ensure compliance with data privacy regulations (e.g., GDPR, HIPAA)?

Remember, the best vendors won't just answer these questions—they'll welcome them. A case management partner worth your investment will have nothing to hide and plenty to share about how they support firms like yours.

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