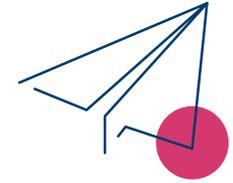
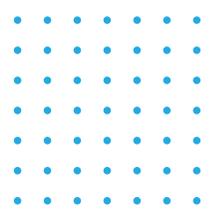




Legal Practice Management Software Scoping Checklist





Legal Practice Management Software Scoping Checklist

If you're interested in finding – and implementing – a new practice management software (PMS) system at your practice, this short checklist will help you pinpoint your key requirements and prepare you for some of the questions you may get asked by potential suppliers. You're welcome to download and return it to us at Quill (sales@quill.co.uk) or another vendor, or you could build on this internally as a framework to start gathering your PMS requirements.

Below, you'll find space to record details about your needs, current challenges and desired outcomes. Although it isn't possible to design/implement a practice management software solution based on one form alone, this information will help you:

- 🔍 Define your requirements, so you can make a more informed decision
- 🔍 Identify your goals
- 🔍 Begin productive dialogue with potential software suppliers
- 🔍 Make sourcing/moving vendors as smooth a process as possible.



About your business:

Name of business:

Address:

Website:

Name of key contact:

Email:

Phone:

Your Areas of Law:

- Civil litigation
- Commercial law
- Conveyancing
- Criminal law
- Employment law
- Family law
- Housing
- Immigration law
- Private client
- Other

Number of partners:

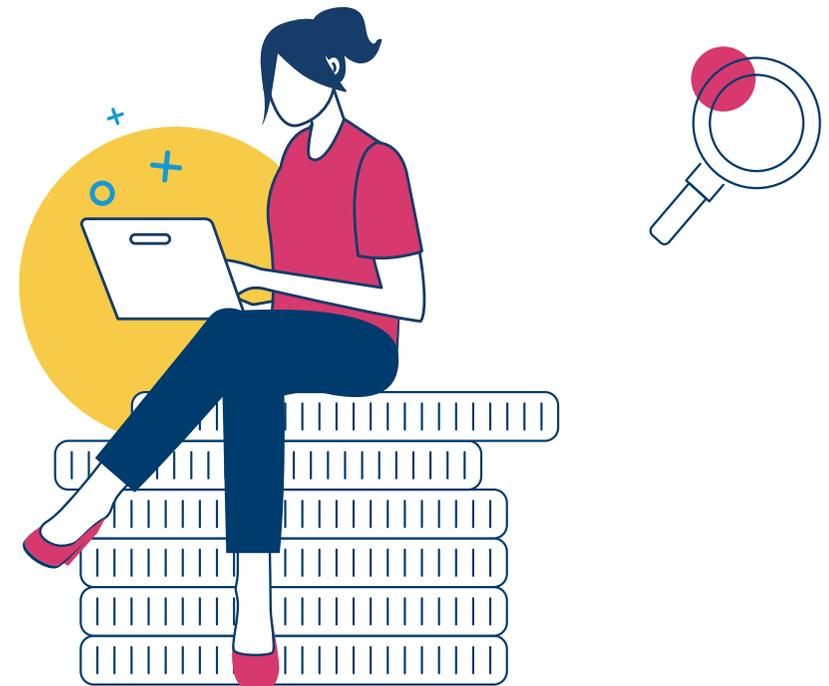
Number of fee earners:

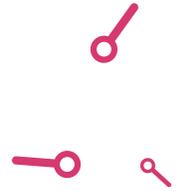
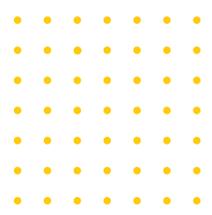
Number of office administration support staff:

Current software system (if applicable):

Contract renewal date:

Annual/ Monthly cost:





Your key driver:

Why are you looking to switch your current practice management system?

.....
.....

Budget and timescales:

Do you have a budget in mind for this new system?

.....
.....

Do you have an idea of when you want to go live?

.....
.....



About your pain points:

What are the key pain points regarding your current system and/or supplier? (it might be an idea to circle your top three or four from this list)

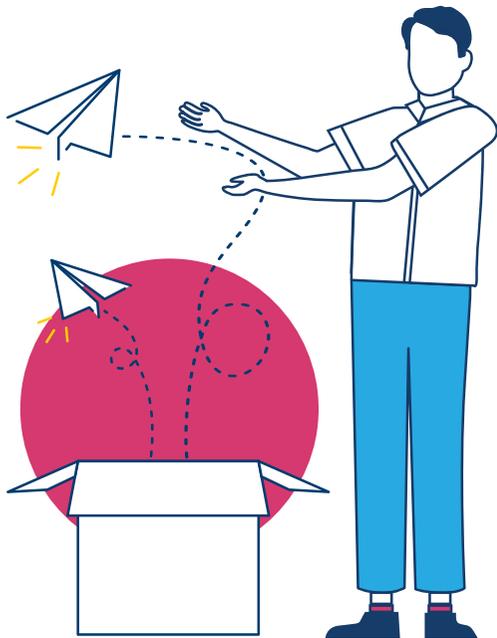
- Quality of support and training is lacking
- Inadequate accessibility via cloud from home and office
- Lack of specific functionality (eg legal aid)
- Too much paper and duplication
- Poor value for money from current supplier
- Lack of integration with other systems
- Difficult to use
- Poor reporting capability
- Limited flexibility or scalability
- Legacy hardware in need of replacement
- Data security and GDPR concerns

About your desired features and functionality:

Which of the following are important for your new system?

Desired deployment option:

- Cloud, SaaS, web-based
- On-Premise
- Mobile



Desired features:

Accounts

- Audit trail
- Breach warnings
- Bank reconciliation
- Billing and invoicing
- Billing rate management
- Cheque writing
- E-chit management
- Electronic payments
- General ledger
- Month end routines
- MTD VAT compliance
- Multiple bank accounts
- Tailored accounts reporting

Client Management

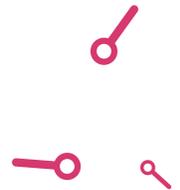
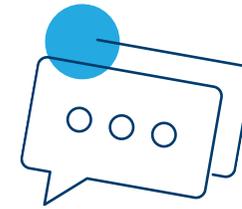
- SMS text messaging
- Will and Deeds management

Time Recording

- Legal aid compliant
- Time and expense tracking
- Time recording
- Multiple stopwatches
- Timesheet management

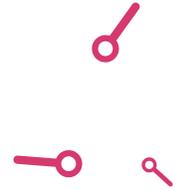
Practice Management

- Activity dashboard
- Contact database
- Customisable fields



About your desired features and functionality:

Which of the following are important for your new system?



Document Management

- Document automation
- Document bundling for court & counsel
- Document check-in/out
- Document classification
- Document generation
- Document management
- Document storage
- Document templates
- Microsoft Excel integration
- Microsoft Outlook integration
- Microsoft Word integration

Case Management and Workflows

- Activity tracking
- Alerts/notifications
- Calendar management
- Deadline management
- Individual and team calendars
- Key dates and deadlines
- Task management
- Task progress tracking
- Task scheduling

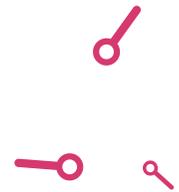
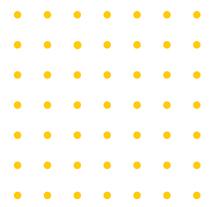
Forms

- Customisable forms
- Legal forms and e-submissions

Compliance

- Anti-money laundering and credit checks
- Bank account and sort code verification
- Conflict management
- LSSA (Legal Software Suppliers Association) membership





About your desired features and functionality:

Which of the following are important for your new system?

Reporting

- Business and financial reports
- Customisable reports
- Reporting and statistics

APIs and Integrations

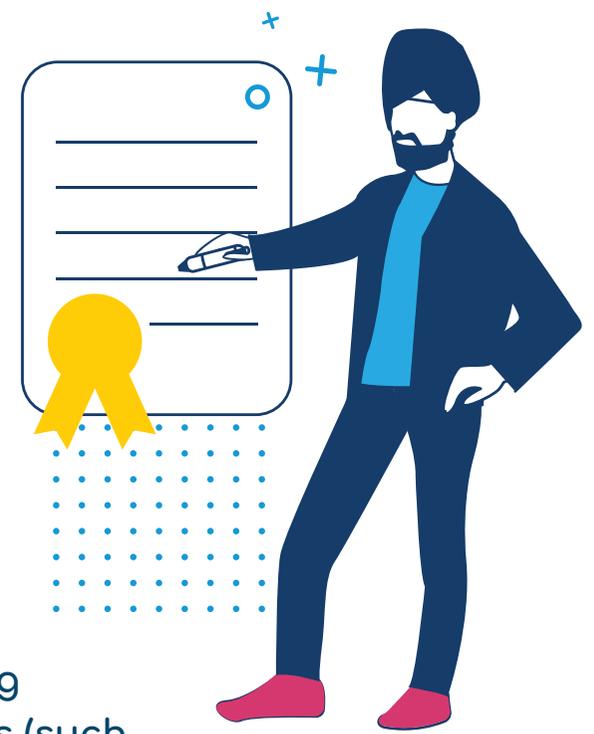
- Client and matter integrations
- Time record integrations
- Open banking
- Sort code and account number verification

Billing and Invoicing

- Customisable bill templates

Security

- Multi-factor authentication
- Role-based permissions
- GDPR compliant infrastructure
- ISO27001 data centre
- Automatic backup
- Cyber Essentials certified



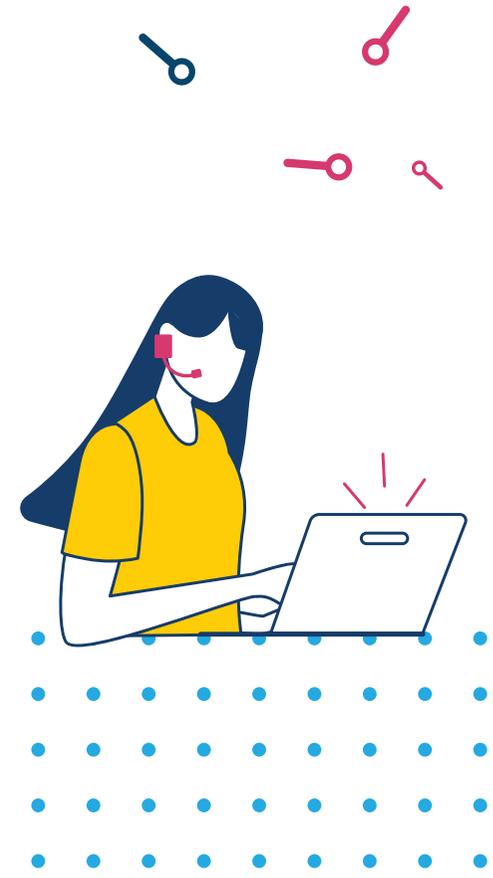
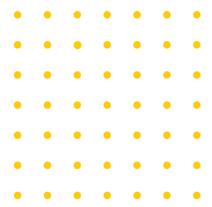
Are you considering outsourcing any of your back-office functions (such as cashiering, payroll, mailroom, typing/transcription, etc.) as part of this changeover?

.....

.....

.....





About your data migration & ongoing support

What data would you need to migrate into a new practice management system?

How would you like permissions set up?

Your shortlist of considered suppliers - don't forget to refer back to Step 4 'Narrow down your search and choose a vendor' in the buyers guide

Any other information?

Please provide any additional details you think would be useful for potential suppliers to know:



We hope this checklist proves useful and good luck with your search.



Ready to manage your practice
the smart way?

Contact Quill today
E: sales@quill.co.uk
T: 0161 236 2910
W: www.quill.co.uk

