



BlindSpot Solutions

Legal Tech Selection Checklist



Introduction to the Legal Tech Selection Checklist

Choosing the right legal technology is one of the most important decisions a law firm can make. The right platform can streamline workflows, improve compliance, enhance collaboration, and deliver a better client experience. But with so many options on the market – from practice management systems to document automation and AI-powered analytics – finding the right fit takes more than just comparing features.

Too often, firms focus on what a system can do in isolation rather than how it will work in practice. A platform might look impressive on its own, but if it doesn't integrate smoothly with your existing tools, it can create more problems than it solves – inefficiencies, data silos, and security risks among them.

The Legal Tech Selection Checklist is a practical guide to help firms evaluate technology options in a structured, strategic way. It highlights the key factors that matter most when assessing new systems – not just functionality, but usability, integration, security, support, and long-term value.

This checklist can be adapted across all areas of legal technology, including:

- Finance and practice management systems
- Time recording and billing platforms
- Document and email management solutions
- Document automation tools
- CRM and business development systems
- Workflow and matter management tools
- Business intelligence and reporting platforms
- Legal research and knowledge solutions
- AI-driven legal tools and analytics
- Integration platforms and data warehouses



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How to Use This Checklist

Use this checklist as a framework to guide your thinking when exploring new technology or replacing an existing system. It helps you structure your assessment, ensuring that no critical considerations are overlooked.

Not every item will apply to every firm, but by reviewing the full list, you'll gain a clearer picture of what truly matters to your organisation. Taking a holistic approach helps you make confident, informed decisions – aligning your technology choices with your firm's goals today and where you're headed tomorrow.



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1. Define Business Needs and Objectives

☐

What problem(s) is the software intended to solve?

☐

Who will be the primary users (lawyers, support staff, IT, clients)?

☐

What are the must-have vs nice-to-have features?

☐

What are the firm's short-term and long-term goals for adopting this software?



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2. Software Functionality and Features

☐

Does it support core legal workflows (e.g., matter management, document automation, time tracking, billing)?

☐

Is it cloud-based, on-premises, or hybrid?

☐

Does it include AI-powered features (e.g., contract analysis, predictive analytics, automation)?

☐

Can it handle multiple jurisdictions, practice areas, and regulatory requirements?

☐

Does it provide built-in compliance tracking (e.g., GDPR, AML, industry-specific regulations)?

☐

Does it support collaboration (internal teams, external counsel, clients)?



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3. Usability and Accessibility

☐

Is the user interface intuitive and easy to navigate?

☐

Can non-technical users easily adopt the system?

☐

Is it accessible for users with disabilities (e.g., screen reader compatibility, keyboard navigation, high-contrast mode)?

☐

Does it have a mobile-friendly design or dedicated mobile apps?

☐

Is there a demo or trial available for user testing?



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4. Integration and Compatibility

☐

Does it integrate with existing firm systems (e.g., practice management, DMS, billing software, CRM)?

☐

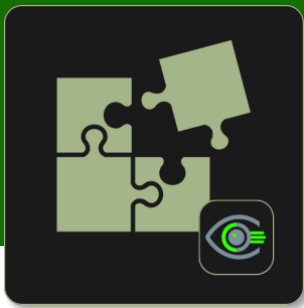
Can it connect with third-party tools via APIs?

☐

Does it support Microsoft 365, Google Workspace, or other productivity suites?

☐

Is there a marketplace or ecosystem for additional integrations?



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5. Security and Compliance

☐

What encryption standards does the software use (e.g., AES-256, TLS 1.2+)?

☐

Does it offer multi-factor authentication (MFA) and role-based access control (RBAC)?

☐

Does it comply with legal industry security standards (ISO 27001, SOC 2, GDPR, HIPAA, etc.)?

☐

Is data stored in a secure, region-specific location to meet data sovereignty requirements?

☐

What backup and disaster recovery measures are in place?



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6. Cost and Pricing Model

☐

Is the pricing model per user, per matter, or subscription-based?

☐

Are there any hidden fees (e.g., setup costs, training, additional integrations)?

☐

What is the total cost of ownership over the next 3-5 years?

☐

Are volume discounts or flexible payment options available?



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7. Vendor Reputation and Support

☐

How long has the vendor been in the legal tech industry?

☐

Are there law firms of similar size/practice area using the software?

☐

What do independent reviews or case studies say about the product?

☐

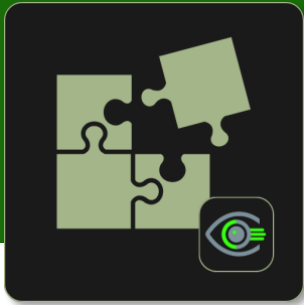
What support options are available (24/7, phone, email, chat, in-person)?

☐

Does the vendor provide onboarding, training, and regular product updates?

☐

Is there a strong user community or knowledge base for self-service support?



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8. Data Migration and Implementation

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Does the vendor offer data migration services from existing systems?

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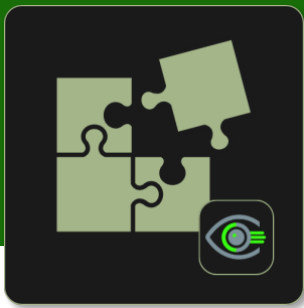
What is the expected implementation timeline?

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How disruptive will implementation be to daily operations?

☐

Are there training resources or personalised onboarding programs available?



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9. Scalability and Futureproofing

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Can the software scale as the firm grows?

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Does it support automation and AI-driven insights for future efficiency improvements?

☐

Is the vendor actively developing new features and enhancements?

☐

How frequently are updates and improvements released?



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10. Decision and Next Steps

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Does the software meet the firm's functional, usability, and security needs?

☐

Have key stakeholders (lawyers, IT, admin staff) tested and provided feedback?

☐

Does the cost justify the benefits?

☐

Have reference checks been conducted with existing clients?

☐

Is a proof of concept (POC) or phased rollout possible before full adoption?



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11. Internal Resourcing and Change Management

☐

Does the firm have a change management plan to ensure adoption?

☐

Is there a dedicated project manager or team responsible for implementation?

☐

Do internal teams have the necessary expertise to configure and maintain the system?

☐

If not, will external consultants or vendors provide support, and at what cost?

☐

Does the firm have internal resources to manage the project effectively?



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Need Help Selecting the Right Legal Tech Solution?

Choosing and implementing the right legal technology can be challenging. Get it wrong, and you risk inefficiencies, low adoption, and wasted investment. Get it right, and you create a platform for smarter workflows, better insights, and stronger client outcomes.

BlindSpot Solutions helps firms cut through the noise and make confident, well-informed decisions. Whether you need support defining your requirements, assessing vendors, planning the rollout, or embedding adoption, we'll guide you every step of the way.

With decades of experience across the legal industry and deep expertise in legal technology, we take a practical, strategic approach that ensures your chosen solution fits seamlessly within your existing tech stack and delivers long-term value.

Our Services Include:

BlindSpot Solutions offers strategic and practical support across the full lifecycle of legal technology and accessibility projects – from assessing where you are now to helping you embed lasting change.

- **Tech Stack Assessments**

Review your firm's current systems, integrations, and pain points to identify gaps, overlaps, and opportunities for improvement. Gain a clear picture of where your technology stands today and what needs to change to support tomorrow.

- **Solution Selection**

Navigate the crowded legal tech market with confidence. We help you define your requirements, evaluate vendors objectively, and select the right solution for the right reasons.

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- **Project Oversight**

Keep your implementation on track, on budget, and aligned with firm goals. We provide independent oversight to ensure vendors deliver and stakeholders stay engaged.

- **Change Management & Continuous Improvement**

Technology success depends on people. We help you manage the change process, build adoption, and embed continuous improvement to maximise long-term value.

- **C-Suite Support**

Provide your leadership team with the clarity, strategy, and confidence needed to make informed technology and transformation decisions.

- **Accessibility Awareness**

Build inclusion into your digital, cultural, and operational environment. We deliver workshops, reviews, and practical tools that help teams see accessibility as everyone's responsibility.

Let's Talk

Whether you're exploring your next legal tech investment, looking to improve your firm's existing systems, or ready to strengthen accessibility and inclusion, BlindSpot Solutions can help.

Start with a free 30-minute discovery consultation to clarify your goals, identify your next steps, and see where the biggest opportunities lie.

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