

Picking the "Best" Law Office Software

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As a part of my professional duties, I often get to discuss law office software with lawyers. Without fail, at some point in the conversation, I am asked which product is the "best" of a certain class of software. This seemingly simple question is actually extremely difficult, if not impossible, to answer. One might as well try to definitively state which automobile make is the best, which political party is the best or which brand of soft drink is the best.

But all lawyers do not practice in the same way and do not think in the same way. I frequently am contacted by a lawyer who absolutely hates a software application in the same week I am contacted by a lawyer who deems it vital and loves it.

Deeming a product "the best" involves a number of factors, and many of them are subjective. Important subjective factors are how logical the desktop display appears to you and whether the software works like you think. Even the objective criteria can mislead you on occasion.

For example, one of the more objective factors is whether the company can survive and not leave the lawyer with unsupported "orphan" software when it folds. We've all seen many technology companies fail. In early 1998, an outstanding Texas trial lawyer spoke at an OBA CLE program and recommended a program called "Time & Chaos" as a great contact manager and calendar program. He showed us some customizations that he had done with the product that looked really interesting. But I was not persuaded. This was one of a very

limited line of software products produced by a small company. It was not nearly as fully featured as the "true" case management software products available. Outlook Express was free and did many of the same things. T&C sold for around \$40 and provided free upgrades for purchasers. With that pricing structure, it did not seem like the company would survive long.

You've probably already guessed that both the product and the company survive to this day. The company actually changed its name to incorporate its flagship product and is now called Chaos Software. (www.chaossoftware.com.) Time & Chaos Version 6 is alive and well. The latest version was released in January, 2006. It now sells for \$45.00 and purchasers can have free upgrades for two years after purchase.

A couple of T&C devotees have posted extremely positive comments about this program on our local online forum. Now the company offers several other applications, including a \$34.95 Legal Billing program, e-mail software, ChaosSync programs to transfer data to Outlook, a Palm Pilot or Pocket PC and several other interesting products.



I still am more comfortable with lawyers purchasing the mainstream applications designed for law firms that have greater functionality. But those who purchase T&C a few years ago think they were right and I was wrong.

So, after stating how difficult it is to determine "the best" software, let me pass along a few tips to help you pick the best for you.

Know Thyself – You don't have to get a degree in philosophy, but the smart software shopper will make a priority list of the features that they want before they start looking at specific products. Often there will be trade-offs and compromises, so it is best to know the most important reasons for a new software purchase in advance. Rank features in importance to you. Otherwise there is the risk of your assistant telling you months later, "But we mainly wanted it to do that, and it doesn't."

Test Drive the Application - The best way for one to pick software is to try it and see if it works for you. Many software packages have free trial periods. The actual user should spend some time seeing how comfortable they are with the program and how well it accomplishes routine tasks for them. The lawyer should personally try out case management and litigation support software while the billing clerk should review time and billing software.

Get Some Reviews – Everyone will love some product so it is not hard for a software vendor to get glowing reviews for advertising material. But talking to another lawyer who uses the product, reading third party reviews in the legal tech publications, searching for information online in user forums like Technolawyer or just doing a Google search for the product name are all ways to get more objective opinions. Consult with your bar practice management advisor if you have one. If there are no reviews of a product online anywhere, pay attention to that omission.

What's in Your Locale? – If several lawyers you know have particular software package or if one is used by most of the lawyers in your area, count that as a big plus. Having someone locally to ask questions or to go in together on group training classes is a big advantage, as is having several of the local legal staff already trained on a package. The staff person that they train today may be working for you tomorrow.

Stick with major players – The above-noted success story of Time & Chaos notwithstanding, it is still a great risk to buy software from a small or a start-up company. Their Web site may look great, but will you able to get telephone tech support when you need it? No one wants to invest the time in learning an application that may not be around next year. If none of the technology proficient lawyers you know has ever heard of it, it is a bad sign.

Get training – The greatest predictor of a successful software installation is whether the lawyers and staff invest time and money in significant training. Think about training resources before you buy and ask the vendor what training resources they suggest. Most software packages can look great in a 10 or 20 minute demonstration, but it is a different matter when you are poised at the keyboard thinking "how did they do that?" Extensive written materials can bridge the gap when there is no local training resource, but software manuals produced by the company are not always clear to the user. Explore third party written materials. There may be no gain if you don't train.



One of the places where legal technologists and lawyers interested in technology get information online is TechnoLawyer. There are many smart people who contribute to TechnoLawyer (www.technolawyer.com) and subscribe to its electronic newsletters. There are other online communities of interest populated by tech-savvy lawyers and vendors as well.

A final very important word is to give yourself a deadline to make a decision. Making a perfect decision is often the enemy of making a decision that is good enough. There probably won't be a

perfect choice for your situation and, if you direct your lawyer skills toward making the perfect choice, you will soon be paralyzed by similar feature sets, rumored new product release dates, differing opinions and a host of competing factors.

Remember that the only “wrong” decision is to be stuck on deciding for months and months on end. Just do it. You pay your money and take your chances. Delaying may result in staff dividing up into camps where there will then be a winner and a loser. Get on with training and installation and use of the product. If later you worry that another product would have been better for the firm, be comforted by the thought that most people do not use all of the features of their software anyway. Good training and customization may mean that your law firm gets more out of the software than others do anyway.

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