

LEGALSONE FIELD GUIDE

Legal Software Vendor Evaluation Scorecard

Compare vendors using weighted operational, security, migration, adoption, and cost criteria instead of a feature checklist.

USE THIS WITH	OWNER	REVIEW DATE
Firm leadership and operations	_____	_____

Scoring method

Score each criterion from 1 (poor) to 5 (excellent), then multiply by the weight.

- [] Agree on outcomes and non-negotiable requirements.
- [] Use the same scenarios and data for every demonstration.
- [] Require evidence for security and migration claims.
- [] Include daily users in scoring.
- [] Document assumptions, exceptions, and follow-up items.

Workflow fit - 30%

Test the work your firm performs every day.

- [] Intake, conflicts, consultation, and engagement.
- [] Matter opening, tasks, deadlines, and documents.
- [] Time, billing, payments, trust, and reporting.
- [] Role-based visibility and approval paths.
- [] Configuration without expensive custom development.

Security and data - 25%

Evaluate controls and contractual commitments.

- ☐ Authentication, MFA, roles, and administrator controls.
- ☐ Encryption, logging, monitoring, and incident response.
- ☐ Backups, recovery testing, and continuity.
- ☐ Subprocessor governance and data locations.
- ☐ Export, retention, deletion, and ownership.

Migration and adoption - 20%

Assess how the firm will get from signed contract to sustained use.

- ☐ Documented discovery, mapping, and test-import process.
- ☐ Validation responsibilities and acceptance criteria.
- ☐ Role-based training and launch support.
- ☐ Post-launch optimization and issue handling.
- ☐ References from firms with similar complexity.

Commercial fit - 25%

Calculate the complete three-year operating impact.

- ☐ License, module, user, storage, and integration fees.
- ☐ Implementation, migration, training, and support fees.
- ☐ Expected annual increases and renewal terms.
- ☐ Tools and manual work the platform can replace.
- ☐ Exit assistance and data-export costs.

Vendor Comparison Worksheet

Complete one column per finalist.

Final decision record

Capture the basis for approval.

- [] Vendor A score: _____ / 5
- [] Vendor B score: _____ / 5
- [] Three-year cost difference: _____
- [] Material risks accepted: _____
- [] Required contract changes: _____
- [] Decision owner and date: _____

This operational resource is for planning and discussion. Adapt it to your firm's professional, legal, and contractual obligations.