

# SCORECARD FOR PRACTICE MANAGEMENT (PM) SOFTWARE EVALUATION

YOUR NAME: \_\_\_\_\_

DATE: \_\_\_\_\_

PRODUCT: \_\_\_\_\_

SYSTEM: \_\_\_\_\_

PLATFORM:     cloud             on premises

USER ACCESS:  online     locally installed

APPLICATION:  all in one     front office     back office

**INSTRUCTIONS:**

1. Evaluate each system for each of the categories described below.
2. Provide a score for each category (or subcategory). Scoring will be based on a scale of 1-4 where the scores are categorized as:
  - 4 - Superior
  - 3 - Exceeds Requirements
  - 2 - Meets Requirements
  - 1 - Does Not Meet Requirements
3. Include comments and observations concerning each system. Add comments describing distinguishing features justifying any qualitative assessment falling in the "superior" or "does not meet requirements" range, although you may add comments to as many categories as you desire. Please try to use specific examples in your comments.

CATEGORY	SUBCATEGORY	SCORE (1-4)	COMMENTS
GENERAL PM FEATURES	<ul style="list-style-type: none"> <li>· fields for different attorney roles (partner, responsible attorney)</li> <li>· area of law field</li> <li>· notes</li> <li>· docket</li> <li>· fast data entry</li> <li>· full client's reference number for matter number</li> <li>· separate client numbers &amp; matter numbers</li> <li>· workflow based - automatic internal emails, assignment of tasks</li> <li>· matter customization; track different matter details for different practice areas</li> <li>· contact customization; track different contact details for</li> </ul>		

	<p>different contact types or customizations</p> <ul style="list-style-type: none"> <li>· client portal and features offered through it (products vary widely on this)</li> <li>· mobile app for data access, time entry, etc.</li> <li>· built-in messaging for internal users, with clients via portal, and texting clients</li> <li>· conflict checking capabilities (products vary widely on this)</li> </ul>		
EMAIL MANAGEMENT	<ul style="list-style-type: none"> <li>· Microsoft 365 / Outlook Integration</li> <li>· Google Workspace / Gmail Integration <ul style="list-style-type: none"> <li>· is Chrome required for these features to work?</li> </ul> </li> <li>· ability to save both inbound and outbound email into the PM</li> <li>· ease of saving inbound email into the PM (e.g., some programs make this as simple as dragging an email into a folder in your email application)</li> </ul>		
CALENDAR MANAGEMENT	<ul style="list-style-type: none"> <li>· Microsoft 365 / Outlook integration</li> <li>· Google Workspace / Google Calendar integration</li> <li>· ability to view multiple firm member calendars at once</li> </ul>		
CONTACT MANAGEMENT	<ul style="list-style-type: none"> <li>· Microsoft 365 / Outlook integration</li> <li>· Google Workspace / Google Contacts Integration</li> </ul>		
ACCOUNTING	<ul style="list-style-type: none"> <li>· retainers on matter level</li> </ul>		

	<ul style="list-style-type: none"> <li>· accept credit card, wire transfer, and checks</li> <li>· refund client money</li> <li>· clients may use 1 check for multiple invoices</li> <li>· integration with QuickBooks/QuickBooks Online/Xero, etc.</li> </ul>		
<b>BILLING</b>	<ul style="list-style-type: none"> <li>· invoice for multiple matters on a client (fees costs, fees costs, instead of all fees then all costs)</li> <li>· LEDES billing - some modified task codes for some clients</li> <li>· PDF by email</li> <li>· selective billing of time and cost entries</li> <li>· past due notices by email</li> <li>· flat rate billing with automatic mark down and up</li> <li>· billing different attorneys at different rates on different matters</li> <li>· flat fees by task</li> <li>· tasks billed hourly, capped with 1 line item on bill</li> <li>· billing monthly and on demand as tasks finish</li> </ul>		
<b>BUSINESS DEVELOPMENT</b>	<ul style="list-style-type: none"> <li>· ability to track some business development</li> </ul>		
<b>DOCUMENT ASSEMBLY</b>	<ul style="list-style-type: none"> <li>· what information can be pulled from the system into documents</li> <li>· can the system do conditional logic (e.g., one paragraph for single person and a different for married couples)</li> <li>· integration with document assembly tools (e.g., HotDocs</li> </ul>		

	Advance, LawYaw, Woodpecker, XpressDox, etc.)		
<b>DOCUMENT MANAGEMENT</b>	<ul style="list-style-type: none"> <li>· ability to store and retrieve documents with practice management system</li> <li>· search full text of documents (not just file name)</li> <li>· search for documents by author, client, type of document, subject of document (e.g., letter, motion, etc.)</li> </ul>		
<b>REPORTING</b>	<ul style="list-style-type: none"> <li>· dashboard reports</li> <li>· reports to clients</li> <li>· export to Excel</li> <li>· custom formatting - to comply with client requirements</li> </ul>		
<b>SECURITY</b>	<ul style="list-style-type: none"> <li>· granular control</li> <li>· different permissions for different people on different matters</li> <li>· client portal with limited access</li> </ul>		
<b>THIRD-PARTY INTEGRATIONS</b>	<ul style="list-style-type: none"> <li>· works with existing products like document management systems, QuickBooks, voice-over-IP phones, etc.</li> <li>· works with third-party storage if not using built-in document storage or a full document management system like NetDocuments (e.g., Dropbox, OneDrive, Google Drive)</li> </ul>		
<b>TIME ENTRY</b>	<ul style="list-style-type: none"> <li>· text expansion</li> <li>· works on mobile devices</li> </ul>		

OTHER	· Any known limitations or additional benefits  ·  ·  ·		
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