The Legal Tech

Buyer's Checklist

henchman

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Introduction

Becoming overwhelmed when it comes to technology decisions is easy. There's so much going on in the tech scene that we even considered hiring Marie Kondo to declutter the space. Unfortunately, even Marie was not up for the job... That's why we took it upon ourselves to guide you through the mess and create a very easy-to-use checklist to help you make the best buying decisions when choosing which legal tech to add to your tool stack. Because "Does it spark joy?" just does not do the trick when it comes to software, or does it? The legal tech market has been growing significantly and, stating the obvious, will only continue to grow in the future. 57% of legal departments say they will increase their technology investment, up from 51% in 2020. So how to decide what are the right tools for your organisation? Bring out your inner critical minimalist and read on!

Initial considerations

- [ ] Describe the problem you are looking to solve. What do you want to achieve with this new technology?
- [ ] What does your organisation’s workflow look like and where do your colleagues lose the most time? Is this technology an answer to that problem?
- [ ] Are all internal stakeholders (users, IT, finance, others) aligned around this initiative?
- [ ] What processes will the new technology enable/accelerate/automate?
- [ ] Who is going to be using the software?
- [ ] Will this new legal tech solution have to integrate with other software your company is already using?

Vendor selection

Product

- [ ] Did the product demo fit your expectations and requirements?
- [ ] Estimate Return on Investment. How much will implementation cost and what returns can be expected?
- [ ] Is it easy to integrate the tool in your existing tech stack? Does the product work on your existing hardware and software environment?
- [ ] Is the software user-friendly? Will it eliminate frustrations and save time?
- [ ] Will the tool facilitate effective remote collaboration?

Data

- [ ] How is data collected and processed in the software? Who owns the data?
- [ ] Where will the data be stored? Is this legal given the type of data you will be collecting/storing?
- [ ] What happens in the event of a data breach? Who will be liable? How much liability will the vendor cover?

Set-up, Maintenance and Support

- [ ] Is there a big workload to set up the tool?
- [ ] What are the support models available for the tool?
- [ ] Who will be giving you support when you need it?
- [ ] Is training required? If so, what training does the company foresee to get you and your colleagues up and running? How are future employees onboarded?
- [ ] Is this service paid for or included?

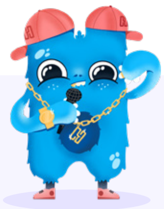
Vendor selection

The Vendor's Roadmap

- [ ] Where do they think the world of legal is going to be in a few years, and does this align with your company's view of the future?
- [ ] Are they transparent about which features are on the roadmap?

Subscription Fees and Hidden Costs

- [ ] Is the pricing specific for the product / service offering your company's needs?
- [ ] Did you get a full list of available products or services, a detailed description of available features, their exact costs or fees and any limitations (e.g. maximum monthly usage or maximum number of permitted users)?



Don't take their word for it

- [ ] If you are still interested in the product after the initial demo and internal discussions, ask for case studies based on comparable use cases. These case studies should show a history of meeting objectives like your own.
- [ ] Ask for a free trial before committing. You want to make sure you know exactly what you're getting into.

01

Initial considerations

When choosing a software it's important to check whether it actually adds up to your strategic list of needs and wants. There is no need to compromise here, especially if the software you are considering purchasing is critical in regard to day-to-day operations. We know it can be hard to see the legal tech forest for the trees, that's why we covered this topic extensively in our mini-guide. But let's go over **the most important initial considerations** once again

Describe the problem you are looking to solve. What do you want to achieve with this new technology?

First and foremost, identify the problem you're trying to solve or the opportunity you're trying to seize with this legal technology purchase. Describing the problem and expressing what it is you want to achieve, will help you to:

1) make a rough estimation of what this problem is costing your company (this is important to determine your 'return on investment in a later stage),

2) convince your colleagues that this is a problem you need to solve, and

3) make sure the tech solution you choose actually addresses this problem.

What does your organisation's workflow look like and where do your colleagues lose the most time? Is this technology an answer to that problem?

To identify whether the problem you have formulated is actually worth solving with technology, it might be worth your while to draw your organisation's workflow and look for bottlenecks: relatively speaking, where does your team lose the most time on a day-to-day basis? You should prioritize solving the problems that could significantly increase the overall productivity of your team. But be careful to choose tools that are easy to implement and that do not drastically interfere with your organisation's existing workflow (read why in our mini-guide). You are not just purchasing software - you are investing in creating more efficient and productive business habits for your employees, you are getting rid of the tasks that really do not spark any joy at all.

Who is going to be using the software?

Apart from the project owner and the stakeholders, you should involve the actual users. The chances of successful implementation of your new software is directly linked to the initial involvement of your team. So please don't make the mistake of buying tech that will never be used, and make sure they are on board. Listen to their wants and needs, and give them regular updates on the software selection process. These people are the real MVPs when it comes to testing!

Are the right internal stakeholders involved and aligned around this initiative?

When it comes to buying technology, on average 5.4 stakeholders are involved (we assume the .4 refers to an office intern, or maybe that one colleague who seems to be hungover 3 out of 5 days). Whether you need fewer or more (or more sober) colleagues involved in your process is up to you, but make sure you appoint a project owner for a successful transition. In our mini-guide we explain how you can pull this off!

What processes will the new technology enable/accelerate/automate?

Now that you have identified the problem, its position in your workflow and who will help you make a decision, it is time to take a look at the processes. Choose one or a few tools that will increase the overall productivity of the team, and that are easy to adopt in the existing work processes. No use in implementing solutions that only address a minor issue while everything else is still a mess?

Will this new legal tech solution have to integrate with other software your company is already using?

Take a good look at your tech stack. We cannot overstate the importance of buying new technology that integrates well with your existing (legal) tech tools. Which other (cloud) software do you use? Where do you store information? Think of tools like Microsoft One Drive, Sharepoint, Google Drive, iManage, ... Make sure you make a complete overview of what technology you already have in place. This list will come in handy when evaluating whether a specific product integrates well with your current set-up. No use in buying something that will just disappear to the bottom shelf of your tech cupboard.

Read all about it in our "Future-proof your legal team" whitepaper. **Download now**

02

Vendor selection

Now that you know what it is you want (what you really really want), it is time to go out there and get it. Take a look at the market; consider what types of tech solutions your industry is using, ask peers in your network about their experiences and read articles about legal tech. Once you know which vendors are worth considering, it's time to decide whether they match your needs and you're ready for that first date (also referred to more mundainly as the 'demo').

Part 1

The product

- [ ] **Did the product demo fit your expectations and requirements?**

Choosing a software system is not something you do everyday, like buying a sandwich - where worst case you are left with the taste of regret and spicy mustard. When it comes to software, you want to make an informed decision and check your ingredients properly. Ask the vendor(s) for a product demo tailored to your case. Prepare yourself for this meeting by listing all the questions you have in advance. Make sure you go home understanding how the product works and how it would solve your specific problem. Don't let them seduce you with a pretty demo but no substance, force them to convince you how their tool will work for you, in your environment.
Afterwards write down your initial thoughts on the product and on the sales rep. In many cases, your pre-sales experience is setting the tone for your support experience post-purchase. Was your sales rep well-informed, helpful and nice? Great! Not so good? Worth reconsidering whether you really want to work with these people. Schedule 5 minutes after each demo to collect your notes, so that you can compare afterwards! We're sure that you're allowed to keep one notebook under the Konmari method for notes like these.

- [ ] **Estimate Return on Investment. How much will implementation cost and what returns can be expected?**

Although it's not an easy exercise, try to calculate the ROI ('return on investment') of the different tools: how much non-billable hours could be turned into billable time? What is the implementation cost? Are there any hidden costs, for example to integrate the tool with existing software? Are there any extra wins for your company, for example making you more appealing as a workplace or more attractive as a customer? Score the different tools so you can compare them to each other, and don't forget about opportunity costs. High implementation efforts may not be worth it (even if out-of-pocket implementation costs are low).

If you have a hard time calculating the ROI, ask the vendor what they think your realized ROI is from the tool. This might help to get you started.

- [ ] **Is it easy to integrate the tool in your existing tech stack? Does the product work on your existing hardware and software environment?**

In the initial phase, you listed your current tech stack. Now it's time to check whether the tool(s) you are considering actually match(es) with that list. Does the product work on your existing hardware and software environment? Is any investment needed to build integrations or is there any redundant work if you don't integrate the different tools (which is, obviously, a hidden cost)?

- [ ] **Is the software user-friendly? Will it eliminate frustrations and save time?**

If there's one thing you don't want the software to do, it is to create new frustrations. You don't want to add clutter to your day-to-day business - that would be Kondo horror in its purest form. Today, it's okay to expect your business software to be as user-friendly as the software that you use in your free time - except if you're a dummy you don't need much explanation to start using social media, right? Of course, business tech might be a bit more complex and ask for some training but the ease of use should at least be the same. **Stay clear of legal tech with very high set-up or maintenance costs** (at the risk of making the decision to jump, but never actually making it across to the other side).

- [ ] **Will the tool facilitate effective remote collaboration?**

Sorry, we really tried but it seems it's impossible to write a white paper in 2021 without reference to the pandemic (or have any type of conversation whatsoever without it, for that matter). So here it goes: COVID-19 changed the way we will collaborate forever. Remote work is here to stay so you better make sure the tools you add to your tech stack facilitate the way your team collaborates. Is the software enabling colleagues to share knowledge? Because let's face it: even when returning to the office you don't want your colleagues to bother you at your desk every 5 minutes with questions they could actually have answered themselves. And God forbid they would videocall you every 5 minutes.

Part 2

Data

- [ ] **How is data collected and processed in the software? Who owns the data?**
- [ ] **Where will the data be stored? Is this legal given the type of data you will be collecting/storing?**
- [ ] **What happens in the event of a data breach?**

As you're working in the legal sector, we should probably not explain the importance of knowing how data is processed in the software, who owns it and where it's stored. But for the people in the back: the GDPR requires companies to know and document these things. So ask the vendor for a detailed explanation. Here's a non-exhaustive list of questions that you could ask:

- How will data be collected?
- What type of data will be collected?
- What rights do you have to use the data?
- Will any analytics tools be used?
- Does the tool use any third-party data?
- What happens with the data if you'd ever switch tools?
- Are there any limitations to integrating the data with other tools?

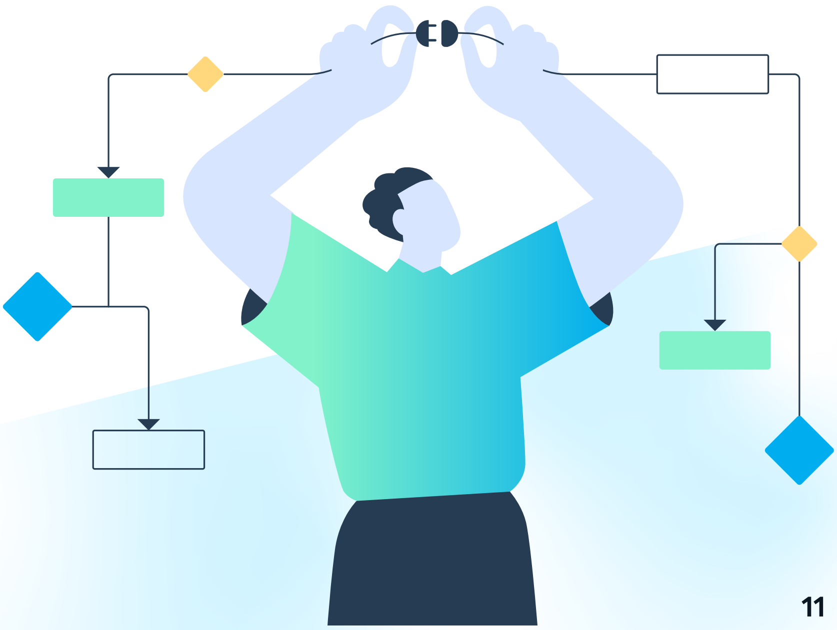
Do the answers to these questions align with your expectations and with how you intend to use the data? Understanding the data flow is essential to implement new software, which should radiate trust (all the more in the legal space). Is data protection not your cup of tea? Just make sure to get a colleague involved who eats data problems for breakfast (preferably with a side of privacy legislation), and/or get your technical support on the decision-making team from the get-go!

Part 3

Maintenance & Support

- [ ] **Is there a big workload to set up the tool?**

Analyze the initial set-up cost for the tool. How much work does it require? Remember, too much work and too many changes to your current way of working are a recipe for disaster. When you have assessed the workload, appoint a single touchpoint who's in charge of the implementation process for your new technology. Pick your best candidate, and give them the authority, leeway, and time to get the tech properly integrated into your system. Just like with the process of choosing a technology, a rushed implementation process with too many hands on the steering wheel is bad for the short term and the long term. On the contrary, no hands on the steering wheel will leave your implementation process astray (and Marie probably already made you get rid of your map to get back on track).



☐ Is there a big workload to set up the tool?

After you tried turning it off and on again, you might occasionally need actual support. Therefore, it is a good idea to see what kind of support the vendor offers upfront. There exist a few (not mutually exclusive) different support models:

- Self-service: there's an FAQ, a knowledge base filled with articles and video's or a forum where you can find the information you need. Typically, this will solve your most basic questions but will frustrate the hell out of you when you need actual help;
- Digital support: when needed, you can contact the company in a digital way. Think of chat, e-mail, or in-app support. Be sure to check responsiveness (or target response times);
- 1-on-1 support: there's a call center where a person will help you figure out what the issue is;
- Personal support: you have a personal support agent who you can reach on a personal email address or phone number. This person knows your company's situation and history with the tool and is your dedicated go-to-person.

☐ Who will be giving you support when you need it?

Think of your support agent as the waiter in a restaurant. This person can actually make or break your experience: what's the use of ordering a great bottle of wine if it's served only at your third course? That's why it might be a good idea to ask if you can already meet them in advance. Prepare some questions to see how they would solve these issues, and explore their willingness to go above and beyond.

- [ ] **Is training required? If so, what training does the company foresee to get you and your colleagues up and running? How are future employees onboarded?**
- [ ] **Is this service paid for or included?**

Some tools will be so user-friendly, that your colleagues will easily get the hang of it. But in general business software might require some training. Is this foreseen by the vendor? And what about onboarding future employees? Will there be tools available to get them started in the tool? This included in the pricing or will you have to pay for additional training. Good questions to ask, we'd say!

Try to spot hidden costs. Once you purchase a software you will want to get it up and running, and you'll probably pay whatever fee it is they ask for the support you need. That might be an expensive show.

Part 4

Subscription Fees and Hidden Costs

- [ ] **Is the pricing specific for the product / service offering your company needs?**
- [ ] **Did you get a full list of available products or services, a detailed description of available features, their exact costs or fees and any limitations (e.g. maximum monthly usage or maximum number of permitted users)?**

We already touched the subject a few times but make sure you have a clear overview of all fees and costs that will come into play. Never accept a pricing that is not tailored to your specific needs. Ask for a complete list of available products and services with detailed descriptions and feature lists - so you know what it'd cost you in case you would want to upgrade to more products and services in the future. Get your hands on the menu before handing over that credit card!

Part 5

The Vendor's Roadmap

- [ ] **Where do they think the world of legal is going to be in a few years, and does this align with your company's view of the future?**
- [ ] **Are they transparent about which features are on the roadmap?**

You preferably don't want to change software systems every few years; you're less hooked than in a marriage but still you want to have a solid basis for a long-lasting partnership. So make sure the software partner's views and beliefs match yours. That's why it's a good idea to ask where the vendor thinks the legal (tech) world is evolving to? What are they going to be investing in in the coming years? What are future functionalities they want to add to their tool? We're not saying you have to go for a "till death do us part" kind of commitment, but you'll want to know whether the love will last longer than one night.

03

Don’t take their word for it

Part 1

References

☐ **If you are still interested in the product after the initial demo and internal discussions, ask for case studies based on comparable use cases. These case studies should show a history of meeting objectives like your own.**

Ask the software vendor for a few references and what they have done specifically for those parties. Contact them to hear about their experience with the tool. Prepare questions you might have. Check your doubts. What were some of the issues they encountered in the implementation process? What's the adoption rate? Ask for specific examples or cases in order to scratch further than the surface.

Part 2

Free trial

☐ **Ask for a free trial before committing. You want to make sure you know exactly what you're getting into.**

You don't marry someone just because they look good on paper, do you? Before closing a deal, make sure you can use the software with real data in a real environment. Get your colleagues who are actually going to use the software to test it out. Test the software extensively. Using the product in a 'real context' is crucial to determine whether the software is really doing what it says it does. Do the functionalities work the way you expected them to? Is the product in practice a good solution to your initial challenge or problem? Make sure you have come full circle.

Conclusion

So, there you have it. A complete checklist to help you sail the seas of legal tech and make your buying experience as smooth as possible. And in the end, we do hope that your final software choice brings you some joy!

Are you using this checklist to buy software that will improve your contract drafting experience? Then you might want to add Henchman to your vendor's list. Henchman is an add-in that helps you draft contracts faster by retrieving your previously written clauses from your contract repository and presenting these clauses to you within your trusted Microsoft Word environment.

Detective Henchman did some investigating and discovered the Henchman answers to some checklist questions.

Let's take a closer look

Henchman's checklist

The problem

When drafting contracts lawyers can easily spend 60 minutes per day looking everywhere for clauses they've written before, or inspirational clauses to recycle. Looking in folders and previously written contracts, and bothering colleagues who in their turn will go through the process of searching for clauses all over again.

Estimate Return on Investment. How much will implementation cost and what returns can be expected?

The set-up is done in less than 2 minutes. Implementation is part of the license cost - no hidden fees or setup costs apply.

Lawyers with Henchman draft 60 minutes faster per day than lawyers without Henchman.

Is it easy to integrate the tool in your existing tech stack? Does the product work on your existing hardware and software environment?

Henchman fits in within your existing Microsoft Word environment and currently integrates a lot of cloud storage systems (OneDrive, Microsoft Teams, Sharepoint, Google Drive, ...) and is constantly expanding its family of integrations.

Is the software user-friendly? Will it eliminate frustrations and save time?

Yes, yes and yes. Or like Olivier Sustronck from Mr. Franklin put it: "The fact that you can use Henchman directly in Word is so convenient. It's quick to open and intuitive to work with too."

Will the tool facilitate effective remote collaboration?

Absolutely. All you need is Wi-Fi to use Henchman! Henchman exists within your Microsoft Word environment and brings together the collective knowledge of your team, bringing your colleagues' (legal) memories even closer than a videocall away.

How is data collected and processed in the software? Who owns the data?

Henchman connects to your database, extracts and saves clause snippets, not contracts. The data remains to be yours at all times and will not be shared by Henchman with anyone else but you. All permissions applicable to your database remain in place.

What happens in the event of a data breach?

Henchman has partnered up with Intigriti; a company that employs 40,000 ethical hackers that are in constant search for vulnerabilities within Henchman

Henchman has a premium cyber security insurance.

Where will the data be stored?

Amazon Web Services in Dublin

Is there a big workload to set up the tool?

No, connect your contract storage space within just one click.

What are the support models available for the tool? Who will be giving you support when you need it?

All our customers enjoy personal support by a dedicated customers success manager

Is training required? If so, what training does the company foresee to get you and your colleagues up and running? How are future employees onboarded?

Simple video training will do for people to understand and work with Henchman. All training videos and material is available online. You simply add new employees in your admin panel and the onboarding process will commence automatically for them.

Is this service paid for or included?

No, onboarding and training is completely free of charge. No hidden costs. Just your annual license fee.

Where do we think the world of legal is going to be in a few years? Where do we see our tool evolving to?

At Henchman we believe legal tech is not here to replace lawyers. Legal tech is here to help lawyers create more value for their clients by enabling them to spend more time on the creative and intellectual tasks, rather than admin or looking up clauses.

Henchman will always pursue to deliver the fastest contract drafting experience ever made in the most intuitive and effective manner possible..

Can I contact someone for questions or can I receive a demo of the Henchman word plug-in?

Off course! Feel free to reach out to Gilles Mattelin, co-founder at Henchman

gilles@henchman.io