



When asked how to select software for a law practice, I always advise a focus on the work, not on the software. Choose software that will enable you to continue to practice law as you wish, but digitally.

Unfortunately, most software is not designed for lawyers and their unique documents. Software technicians do not understand the "lawyering process." For example, Microsoft Access is a database that can be customized to handle abstracts of document records. That's fine, but what do I do about depositions and the documents attached to them as exhibits? Do I summarize the entire deposition and enter the testimony in the database along with the documentary information? Or do I import the deposition into a full-text program like LiveNote (www.livenote.com) and search for key terms of a witness's testimony? Then I will have two programs and need two different reports to analyze my case. How do I remember that I am using one, two or more programs on a particular case?

Generally, the lawyer is not interested in software's particular features but in applying it to give him an edge in representing his clients. If you want to be able to cut portions of a deposition and transfer the testimony to a "cross-examination" file along with the automatic transfer of the witness name, volume number and accurate page and line number, then ensure the software can do this. Many full-text programs cannot. The vendors typically demonstrate features, not legal functions, to the attorney because they have diverse markets or they do not understand your needs.

Traditionally, software was developed as stand-alone applications. For example, word processing programs did not share data with spreadsheet programs, and vice versa. This created more work for the user because real-life needs require the use of both programs. The software companies are moving away from a technology-cen-

tered and more toward a human-centered approach to work, focusing on the needs of the user in his everyday work environment. For example, Summation (www.summation.com) contains litigation-focused database, full-text, imaging, real-time and outliner modules, and they have integrated their product with

## Hard Choices in Software Purchases



TrialDirector (www.indatacorp.com), a trial presentation program.

Some steps for purchasing software:

- Determine the legal or office function you wish to automate.
- Determine what features the staff wants.
- Have a small representative group test

Michael R. Arkfeld is an Assistant United States Attorney in Phoenix. He is the author of *The Digital Practice of Law* (5th edition) and a frequent speaker and columnist on the practice of law. He can be reached at Michael@Arkfeld.com.



- a demo or evaluation copy.
- Test-drive full versions of two or three different products.
- Determine the cost to purchase, install, implement, train, upgrade and support.
- Check references.
- After purchase, manage the transition, and install, implement and train.

Some key considerations in selecting software:

- How does the software fit into the long-term strategy of the firm?
- What is the background and commitment of the technology company?
- Is the new software worth the changeover and retraining of the staff?
- Can the program be integrated with other existing programs?
- Is it user-friendly and easy to use? Do you like the interface?
- Is there security for only specific users to see data?
- Do I know others who have used the software? Are they satisfied?
- Is the documentation clear and understandable?
- Are there quality online tutorials or other training materials?
- Is it easy to set up and learn? What is the estimated learning curve?
- What are the support policies and how easy is it to get assistance?
- What is the per user cost on a stand-alone and a network version?
- Will upgrades be provided free for 3, 6, 9 months or longer?
- Does it support multiple platforms, such as DOS, Windows 95/98/00 and Macintosh?
- Will it handle the size of your case? ▀