

2nd Edition

In-House Legal Team's Guide to Buying Legal Technology

A practical guide to preparing for,
selecting and adopting legal technology



Introduction

The legal technology market has matured. The buying process needs to mature with it.

Legal teams now have access to a wider range of technology than ever before, from specialised point solutions to end-to-end legal operations platforms and AI-enabled tools. This creates more choice, but it also increases the risk of buying technology before the team is ready to use it well.

A successful project starts before vendor research. The legal team needs to understand the problem, the process, the users, the data and the organisational constraints. It also needs a realistic plan for implementation and adoption. Without this foundation, even capable technology can become another underused system.

This guide provides a practical process for preparing for, selecting and adopting legal technology. It is designed for in-house legal teams that want to make a disciplined decision without turning the project into an unnecessarily complex procurement exercise.

The core principle

Do not begin with a product or a feature list.
Begin with the problems that need to be solved and the outcome the organisation needs to achieve.

How to use this guide

The process is presented in a logical sequence, but it does not need to be rigid. A smaller purchase may require a lighter version of each step. A larger platform project will require more formal governance, technical review and change support. These are some suggestions:

- Use the readiness questions to decide whether the team is prepared to buy
- Complete the foundational work before approaching vendors
- Use the templates to create a consistent and documented evaluation process
- Scale the level of detail to the risk, cost and organisational impact of the project



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A practical approach

The quality of the preparation matters more than the volume of documentation. Keep the process focused, make decisions explicit and record the reasons behind them.



1. Are You Ready to Buy Legal Technology?

The first decision is not which technology to buy. It is whether the team is ready to buy at all.

Legal teams often start looking at products when pressure is high. The team may be overwhelmed by email, reporting may be difficult, external spend may be rising or the business may be frustrated with how legal support is accessed. These are valid reasons to act, but urgency can lead to a rushed market scan and a poor decision.

Before approaching vendors, confirm that the team understands the problem and has enough internal capacity to make and implement a decision. Readiness does not require every process to be perfect. It does require clarity about what needs to change and who will lead the work.

Readiness check

A legal team is ready to explore technology when it can explain how the work currently happens, what is getting in the way and what needs to improve.



Readiness questions

☐	Can we clearly describe what we are trying to improve and why it matters?
☐	Can we describe the problem in business terms, rather than a general frustration or feature request?
☐	Do we understand the current process, including the main bottlenecks and workarounds?
☐	Have we identified and spoken to the people who will use, administer or be affected by the technology?
☐	Do we understand the data and documents involved, where they are currently stored, who can access them and what needs to be retained?
☐	Do we know what should be simplified or standardised before it is automated?
☐	Is there a named project owner and project sponsor and can the team commit enough time to lead, test and adopt the change?
☐	Do we understand the internal approval, security, privacy, procurement and budget requirements?

If several answers are “no”, complete the missing foundational work before starting the market scan. This usually saves time later.

2. Define the Problem and Desired Outcomes

Clear objectives keep the project focused on the problems that need to be solved and make it easier to separate genuine requirements from nice-to-have functionality.

Start with the specific problems the legal function and its stakeholders are experiencing. Avoid broad statements such as “we need to be more efficient” or “we need AI”. These describe a direction rather than the underlying problem. A useful problem statement explains what is happening, who is affected and the impact. Speaking with stakeholders and capturing examples can help uncover the issues that need to be addressed.

Write practical problem statements

These are examples of stronger problem statements.

WEAK	STRONGER
We need a matter management system.	Legal requests arrive through multiple channels, which makes work difficult to prioritise, assign and report.
We need better reporting.	The team cannot produce reliable matter, risk and spend reporting without manually combining spreadsheets and emails.
We need AI.	Lawyers spend significant time preparing recurring matter summaries from information already held across the legal team’s systems.

Define the outcome

For each problem, describe the result the team wants to achieve. In practical terms, what does success look like? Outcomes should be specific enough to guide requirements and later measure success, such as:

- Provide one clear channel for legal requests
- Reduce incomplete instructions and avoidable follow-up
- Give the team real-time visibility of work, risk and deadlines
- Improve control of external engagements, budgets and invoices
- Create a consistent record of matters, decisions, documents and approvals
- Reduce manual reporting and improve confidence in legal data
- Make legal support easier for business users to access and understand

Set baseline measures

Measure the current position before implementation. Without a baseline, it is difficult to demonstrate whether the technology improved performance. The measures do not need to be perfect. They need to be credible and repeatable, such as:

- Volume of requests or matters
- Time taken to triage, assign or complete work
- Percentage of requests received with complete information
- Time spent preparing reports
- Number of systems or spreadsheets used to manage the same work

3. Review Processes, Users and Data

Technology works best when the team understands how work should flow and what information needs to support it.

Map the current process

Select the processes that are within scope and map them from beginning to end. Focus on what actually happens, including informal workarounds, rather than the process people believe should happen.

1. Identify how work enters the legal team.
2. Record the information collected at the start.
3. Show how work is triaged, assigned and prioritised.
4. Identify approvals, handoffs, external engagements and decision points.
5. Record where documents, emails and key advice are stored.
6. Identify reporting, closure and retention requirements.



Simplify before automating

Before looking at new technology, review the current process and identify unnecessary complexity. Eliminate steps that no longer serve a clear purpose, combine duplicated approvals and standardise common processes where possible. Standardise common processes where possible, while allowing different approaches where the type of work, team, level of risk or regulatory obligations require them.

A useful test

Ask: “If we were designing this process today, would we include this step?” If the answer is no, do not automate it without a clear reason.

Define the future process

Create a simple future state process that shows how work should operate after implementation. This becomes the basis for requirements, vendor demonstrations and configuration decisions. These questions are a helpful prompt:

- Who can submit work and through which channels?
- What information is mandatory at the start?
- How is work categorised, prioritised and assigned?
- Which approvals or controls are required?
- Who can view, edit or receive updates?
- When should external counsel be engaged?
- What information should be captured for reporting?

Understand users and stakeholders

The legal team is rarely the only user group. Business stakeholders, executives, procurement teams, finance teams, external firms and system administrators may all interact with the technology. Identify what each group needs to do and what they should be able to see.

USER GROUP	KEY QUESTIONS
Business users	How will they request legal support, provide information and receive updates?
Lawyers	How will they triage, manage, collaborate, record advice and report?
Legal operations & administrators	What can they configure, monitor and maintain without vendor support?
Legal leaders	What oversight, controls, risk and performance information do they need?
External firms and providers	How will they receive instructions, share information, submit budgets and invoices?
IT & Security	What identity management, access controls, integrations and system performance information do they need?
Finance team	At what point do they need POs and approved invoices and what data do they need to support this?

Assess data readiness

Data preparation should begin before vendor selection, not implementation. Identify what data the future process and new system will require, whether it is reliable and who will maintain it. Challenge the common assumption that you should migrate everything as migration projects can be costly and technically challenging.

Start by asking:

1. What are we trying to achieve?
2. What is the minimum that we need to migrate?
3. Are there alternatives to migration that we could explore?

This is a helpful checklist to assess your data readiness:

☐	Matter types, categories and statuses are clearly defined.
☐	The data fields that we want to capture have a clear purpose and owner.
☐	Existing data has been reviewed for gaps, duplication and inconsistent terminology.
☐	The team has decided what historical data should be migrated, archived or left behind.
☐	The authoritative system or systems for matters, documents, spend and related information have been agreed.
☐	Permissions, confidentiality and retention requirements are documented.

4. Engage Stakeholders and Establish the Project

Stakeholder engagement is most useful when responsibilities and decision rights are clear.

Legal technology affects more than the legal department. Involve the people who will use the technology, approve the purchase, review risk and support implementation. The objective is not to give every stakeholder equal control. It is to obtain the right input at the right time and avoid surprises.

Identify the core team & key stakeholders

ROLE	RESPONSIBILITY
Executive sponsor	Supports the case for change, removes obstacles and confirms strategic alignment.
Project owner	Leads the project, coordinates decisions and remains accountable for delivery.
Legal subject matter experts	Define processes, requirements, risks and practical use cases.
Legal ops / project manager	Coordinates documentation, evaluation, implementation and adoption.
IT, security and privacy	Confirm architecture, security, integration, data and compliance requirements.
Procurement and finance	Guide budget allocation, procurement, evaluation, approvals and contracting.
User representatives	Test whether the proposed process and technology work in practice.

Understand the internal gates

Technology procurement projects typically involve a number of approval processes and stages, and it is important to understand these organisational requirements early. Ask stakeholders to explain the internal process before the market scan begins. Record the required documentation, decision makers, review periods and thresholds.

These are some of the common internal gates for technology procurement:

- Budget and business case approval
- Procurement thresholds and policy requirements
- Information security and privacy review
- Enterprise architecture and integration approval
- Records management and data residency requirements
- AI governance review
- Contract review and delegated authority

Avoid this common pitfall

Do not wait until a preferred vendor has been selected to discover that a required security control, data location or procurement process has not been considered.

5. Build the Initial Business Case

The business case should shape the buying process and set you up for success.

An initial business case creates discipline around the problem, investment and expected outcomes. It also helps the team determine whether the project is proportionate and how much change the organisation is prepared to support.

What the initial business case should cover

You don't need to overcomplicate the initial business case. Keep it straightforward and easy to understand. It should incorporate:

- The current problem and its operational or financial impact
- The proposed scope and the teams affected
- The outcomes and baseline measures
- The main technology and process options considered
- Expected implementation, subscription and internal resource costs
- Expected financial, operational, governance and risk benefits
- The approval process and indicative timing



Consider the full cost

Subscription fees are only one part of the investment. Include the internal and external costs required to implement and operate the solution.

COST AREA	EXAMPLES
Technology	Licences, modules, storage, transactions, AI usage and sandbox environments.
Implementation	Configuration, project management, migration, integrations and testing.
Internal effort	Stakeholder engagement, decision making, data preparation, training and administration.
Ongoing operation	Support, system ownership, reporting and internal IT resources required.
Exit	Data extraction and transition support.

Define how value will be measured

Select a small number of measures that can be tracked after implementation. The measures should reflect the reason for buying the technology, such as:

- Adoption of the agreed intake or workflow process
- Reduction in manual follow-up
- Improvement in cycle times or response times
- Reduction in reporting effort
- Improvement in budget control or invoice compliance
- Improvement in user experience, visibility or control
- Reduction in time spent searching for and filing information

6. Define and Prioritise Requirements

Requirements should explain the specific features and criteria that the organisation needs to achieve success.

Use the problem, user stories, future process, and data requirements to define what the technology must support. Keep the first version focused and high-level. Once this has been agreed, you can prepare more detailed requirements if necessary.

Separate requirement types

TYPE	WHAT IT COVERS
Functional	What users need to do, such as submit requests, assign work, approve spend or create reports.
Technical	Integrations, identity management, performance, APIs, webhooks and administration.
Security and privacy	Access controls, encryption, data residency, audit records, incident response and data retention.
Implementation	Configuration, migration, training, support, service levels and customer success.
Commercial	Pricing, inclusions, annual increases, additional charges and end of contract
AI	Use cases, data access, model controls, human review, auditability and monitoring.

Prioritise requirements

Use a simple prioritisation method. This prevents every request from being treated as mandatory and helps vendors focus on the capabilities that matter most. This will also assist with vendor evaluation.

PRIORITY	DEFINITION
Must have	The solution cannot proceed without this capability or control.
Should have	High value and strongly preferred, but a practical alternative may be acceptable.
Nice to have	Useful if available, but not central to the outcome.
Future	Potential future need that should not influence the current decision.

Good requirements start with realistic user stories

A user story explains who needs to perform an action, what they need to do and why. By starting with the user story, you ensure that the requirements are grounded in how the process needs to work and will give the vendor enough context to demonstrate the solution in a practical way.

Example user story

As a business stakeholder, I need to submit a legal request through a guided form so that I know what information is required and can track progress without emailing the legal team.

7. Conduct the Market Scan

The purpose of the market scan is to identify credible options, not to evaluate every legal technology product.

Begin the market scan only after the team has drafted requirements, an understanding of internal approvals and an indicative investment range. This allows the team to ask better questions and quickly exclude unsuitable options.

Look for fit, not familiarity

A well-known vendor is not automatically the right vendor. Assess the fit between the organisation's needs and the vendor's product, implementation model, customer base and ability to support the project over time.

When conducting the market scan consider:

- Relevant functionality and workflow coverage
- Experience with similar legal teams, industries or government environments
- Ability to integrate with the organisation's current and planned systems
- Security, privacy, data residency and compliance alignment
- Implementation approach and internal effort required
- Vendor stability, product investment and customer support
- Commercial model and likely total cost

Point solution or broader platform?

A point solution may be appropriate for a specific, well-defined problem. A broader platform may be more suitable where the organisation needs connected processes, common data and consistent controls across multiple areas of legal work. Consider both the immediate problem and the cost of creating another disconnected system.

These are some questions to ask yourself:

- Will the solution create a new data silo?
- Can it connect with core business systems?
- Can it support future use cases?
- Is the platform configurable?

Create a manageable shortlist

Shortlist three to five vendors for initial demonstrations. More options usually add time without improving the result. Record why each vendor was included and any known limitations that need to be tested.

Use directories with caution

Directories, review sites and AI-generated comparisons can help identify options, but they may be incomplete, commercially influenced or out of date. Validate important claims directly with the vendor and reference clients.

8. Run Structured Demonstrations

A demonstration should test the solution against your needs and requirements, not showcase the vendor's preferred features.

Provide each shortlisted vendor with the same core scenarios and enough context to prepare. This makes demonstrations easier to compare and reduces the risk that a polished presentation distracts from practical gaps.

Prepare the demonstration brief

Take the time to prepare a demonstration brief for the vendors. While there is a temptation to skip this step, it really does pay dividends as the demonstrations will be aligned to your needs and not a generic pitch.

This is what you should look to include in the brief:

- Summarise the organisation, your legal team structure and project objectives
- Provide three to five priority user stories or process scenarios
- Identify the user roles the vendor should demonstrate
- List the mandatory technical, security or integration questions
- Ask the vendor to distinguish standard capability, configuration, custom work and roadmap items
- Request indicative implementation scope, timing and pricing after the demonstration

What to ask vendors to show

As part of the brief or during the demonstration, ask the vendor to show:

1. The complete workflow from request or instruction through to reporting and closure.
2. How different users see and interact with the same matter or process.
3. How permissions, approvals and audit history operate.
4. How administrators change forms, workflows, notification emails, fields, dashboards or rules.
5. How documents, emails, spend and related information are connected.
6. How integrations and data exchange work in practice.
7. How AI features are controlled, reviewed and recorded where relevant.

Score consistently

Agree the evaluation criteria and weightings before the demonstrations. Each participant should score independently before the group discusses the result. This reduces the influence of seniority, presentation style and the most recent demonstration. Suggested criteria includes:

- Fit with priority use cases
- Usability and adoption
- Configuration and administration
- Technical, security and integration fit
- Implementation and support
- Commercial fit

9. Evaluate Solutions and Complete Due Diligence

The evaluation stage confirms whether the preferred solution is capable, secure, supportable and commercially sustainable.

After the initial demonstrations, reduce the shortlist to no more than two vendors. Conduct deeper demonstrations and due diligence focused on unresolved questions and higher risk requirements.

Deep dive demonstrations

Use the second round to examine the details that could affect implementation or adoption. Ask the vendor to show complex scenarios, exceptions, reporting, administration and integrations. Confirm which capabilities are available now and which depend on future development.



Reference clients

Ask for an introduction to the vendor's existing clients that are similar in size, sector, region or use case. Ask about the implementation effort, vendor responsiveness, adoption, product limitations, security and whether the realised value matched the original case for change.

Security, privacy and technical review

This is a checklist of what is typically included as part of a security, privacy and technical review:

☐	Security certifications, independent testing and information security documentation have been reviewed.
☐	Data hosting, processing locations and subprocessors are understood.
☐	Identity, single sign-on, user provisioning and role-based access requirements can be met.
☐	Encryption, audit records, monitoring and incident response are adequate.
☐	Business continuity, backup and disaster recovery arrangements are acceptable.
☐	Integration methods, APIs, webhooks and support responsibilities are understood.
☐	Data export, retention, deletion and exit arrangements are acceptable.

AI assessment

AI capability should be evaluated against a defined use case. Do not treat the presence of AI as proof of value. Confirm whether the feature improves the process and whether the organisation can govern its use.

QUESTION	WHAT TO CONFIRM
What problem does the AI solve?	The use case is specific and connected to an agreed outcome.
What information can it access?	Access follows existing permissions and does not expose unrelated information.
Where is data processed?	Hosting, inference location, retention and model provider are understood.
Is customer data used for training?	The vendor's contractual and technical position is clear.
What human review is required?	A person remains accountable for decisions and higher risk outputs.
Can activity be audited?	Inputs, outputs, actions, approvals and relevant sources are recorded.
How is performance monitored?	Accuracy, failure modes, model changes and feedback are managed.

Use a proof exercise only when necessary

A generic trial can consume significant time and resources without answering the important questions. Use a proof of concept or proof of value only where a material uncertainty remains. If a trial or pilot is required, follow these good practice principles:

- Define the question being tested
- Use realistic but approved data and scenarios
- Limit the users and timeframe (the shorter and more specific the better)
- Agree success measures in advance
- State what decision will follow from the result

Run a live user workshop

A great alternative to a time-restricted trial is to run a live workshop with a few users where the vendor runs through specific workflows and user stories interactively. This helps users get comfortable with the interface and have an opportunity to ask deeper questions.



10. Make the Decision and Negotiate the Contract

The final decision should connect the evidence back to the original problem, objectives and risk requirements.

Compile the evaluation results, due diligence findings, reference feedback, implementation approach and commercial position. Present the decision in a way that allows stakeholders to understand both the preferred option and the trade-offs.

Prepare the complete proposition

Pull together an overview of the recommended solution and implementation plan. Include the following:

- Fit with the priority outcomes and requirements
- User experience and likely adoption
- Configuration, administration and future flexibility
- Security, privacy, data and technical alignment
- Implementation effort, timing and internal capacity
- Vendor capability, support and product direction
- Total cost of ownership and identified contractual risk

Do not go straight to implementation

Avoid beginning material implementation work before security review and contract terms are sufficiently settled. Late changes to infrastructure, data processing or scope can create rework and risk.

Confirm commercial assumptions

Request a formal proposal and contract that identifies all implementation and ongoing costs. Model likely usage rather than relying only on the minimum quoted price.

☐	Licence basis, user types and included modules are clear.
☐	Storage, transaction, integration and AI usage charges are understood.
☐	Implementation scope and assumptions are documented.
☐	Training, support and professional service rates are clear.
☐	Annual price increases and renewal arrangements are acceptable.
☐	Data extraction, transition assistance and exit costs are defined.

Contract points to address

These are some common aspects to consider in the contract:

- Scope, responsibilities, deliverables and acceptance criteria
- Security, privacy, data processing and incident notification
- Service levels, support and business continuity
- Intellectual property and use of customer data
- AI-specific terms if AI is included
- Renewal, termination and secure deletion

11. Plan Implementation and Adoption

Vendor selection is the midpoint of the project. Value is created through implementation, adoption and consistent use.

Establish implementation governance

Confirm the project owner, sponsor, decision makers, workstreams, meeting cadence and escalation process. Agree what the vendor will deliver and what the organisation must provide.

Control the initial implementation scope

Prioritise the processes, integrations, data and user groups required for a successful first release. Avoid using implementation as an opportunity to solve every legal operations issue at once. A controlled initial scope creates faster learning and reduces risk.

Phase with purpose

A phased implementation should create usable outcomes at each stage. It should not defer critical dependencies, controls or data decisions that are required for the first release.



Implementation workstreams

WORKSTREAM	KEY ACTIVITIES
Process and configuration	Confirm workflows, forms, rules, permissions, reports and responsibilities.
Data	Clean, map, migrate, validate and assign ownership for ongoing quality.
Integrations	Configure, test and document data exchange and failure handling.
Testing	Complete system, integration and user acceptance testing.
Change and communications	Explain the reason for change, new process, timing and user responsibilities.
Training and support	Provide role-based learning, practical scenarios and help resources.
Go-live and hypercare	Confirm readiness, monitor issues, support users and stabilise the new process.

Design adoption, do not assume it will happen

People need to understand why the process is changing, how it affects their work and what is expected after go-live.

Involve users early, test real scenarios and remove competing processes where possible. These are some tips:

- Communicate early and often
- Create champions who can provide support and feedback
- Make the process easier than the workaround it replaces
- Provide clear support channels during the first weeks

12. Measure Results and Improve

The technology needs an owner after the project team finishes.

Assign ongoing responsibility for the system, process and vendor relationship. Without clear ownership, configuration can drift, data quality can decline and opportunities to maximise value can be missed.

Review benefits

Return to the original objectives and baseline measures. Review performance after the process has stabilised, then at regular intervals. Where benefits have not been realised, determine whether the cause is the technology, process design, data, adoption or an unrealistic assumption in the business case.

REVIEW POINT	FOCUS
30 days	Stability, access, support issues, user confusion and immediate fixes.
90 days	Adoption, data quality, process compliance and early operational results.
6 months	Benefits, reporting, configuration improvements and further rollout decisions.
Annually	Strategic fit, vendor performance, security, integrations, roadmap and value.

Establish ongoing ownership

Ongoing technology ownership typically involves:

- Managing user access, permissions and periodic reviews
- Maintaining forms, workflows, fields, reports and guidance
- Monitoring data quality and resolve recurring issues
- Assessing vendor releases and plan improvements
- Coordinating integrations, support and security reviews
- Providing feedback to the vendor on improvements
- Staying up to date on the product roadmap

Continuous improvement with discipline

Maintain a prioritised log of desired improvements and changes linked to user value, risk and strategic outcomes. Avoid making frequent configuration changes without considering their effect on data, reporting and user behaviour.



13. Final Buying Checklist

Use this checklist to ensure you have the right foundations in place before confirming the purchase and moving into implementation.

☐	The problem, scope and desired outcomes are documented and agreed.
☐	Current and future processes have been reviewed.
☐	Users, stakeholders, decision makers and the project owner are identified.
☐	Data requirements and migration have been considered.
☐	The initial business case and baseline measures are complete.
☐	Functional, technical, security, service, commercial and AI requirements are prioritised.
☐	Shortlisted vendors have demonstrated the same scenarios.
☐	Evaluation criteria and scoring were agreed before the decision.
☐	Security, privacy, technical and AI due diligence is complete.
☐	Reference clients have been consulted where appropriate.
☐	Implementation scope, responsibilities, timing and internal effort are understood.
☐	The total cost of ownership and contractual terms are acceptable.
☐	The adoption, training, communications and support plan is credible.
☐	Ongoing system ownership and benefits measurement are assigned.

The final test

Can the team explain why this solution is the best fit, what needs to change for it to succeed and how the organisation will know whether the investment delivered value?



14. Templates and Worksheets

The following templates can be adapted to suit the scale and risk of the project.

Template 1: Technology readiness worksheet

QUESTION	YES / NO	ACTION REQUIRED
Is the business problem clearly defined?		
Is the current process understood?		
Has the future process been outlined?		
Are users and stakeholders identified?		
Is the required data understood?		
Is there a project owner and sponsor?		
Are approval and review requirements known?		
Can the team commit implementation time?		

Template 2: Problem and outcome summary

FIELD	RESPONSE
Current problem	
Who is affected	
Operational or financial impact	
Desired future outcome	
Baseline measures	
Success measures	
Project scope	
Out of scope	

Template 3: Requirements register

ID	USER / PROCESS	REQUIREMENT OR USER STORY	PRIORITY	OBJECTIVE
R01				
R02				
R03				
R04				
R05				

Template 4: Demonstration scorecard

CRITERION	WEIGHT	VENDOR A	VENDOR B	NOTES
Priority use cases	30%			
Usability and adoption	15%			
Configuration and administration	10%			
Technical, security and integration fit	20%			
Implementation and support	15%			
Commercial fit	10%			
TOTAL	100%			

Template 5: Due diligence questions

AREA	QUESTION	RESPONSE	EVIDENCE
Security	What independent assurance and testing can the vendor provide?		
Data	Where is customer data hosted, processed and backed up?		
Access	How are identity, roles, permissions and user provisioning managed?		
Integration	What APIs, webhooks and standard integrations are available?		
AI	What models are used and is customer data used for training?		
AI	How are outputs reviewed, recorded and monitored?		
Continuity	What are the recovery objectives and incident procedures?		
Exit	How can all customer data be exported and securely deleted?		

Template 6: Implementation readiness checklist

☐	Project governance, responsibilities and decision rights are confirmed.
☐	Initial implementation scope and success criteria are agreed.
☐	Process design and configuration decisions are complete.
☐	Data cleansing, migration and validation plans are confirmed.
☐	Integration scope, testing and support responsibilities are documented.
☐	User acceptance testing scenarios and participants are confirmed.
☐	Communications, training and support materials are ready.
☐	Security, privacy and contract conditions have been satisfied.
☐	Go-live criteria, contingency arrangements and hypercare are agreed.
☐	Ongoing ownership is assigned before project closure.

The Takeaway

Buying legal technology is not simply a product selection exercise. The quality of the outcome depends on the work completed before the market scan and the discipline applied after the contract is signed.

Legal teams are more likely to succeed when they define the problem, simplify the process, prepare the data, involve the right stakeholders and evaluate vendors against realistic scenarios. They also need a clear implementation and adoption plan, with ongoing ownership after go-live.

The objective is to make a well-supported decision, implement the technology in a controlled way and maximise measurable value for the legal team and the organisation.

Final principle

Buy for a clear outcome.
Implement for adoption.
Govern for long-term value.



About Lawcadia

Lawcadia is the intelligent end-to-end legal operations platform for in-house legal teams operating in complex and regulated environments. With a unique two-sided platform and intelligent automation engine, Lawcadia is trusted by corporate and government clients to:

- Streamline intake and automate triage
- Manage workflows, matters, documents and email in one place
- Track, manage and report on statutory obligation timeframes such as FOI matters
- Control law firm engagement, RFPs and budgets
- Automate approvals and invoice review
- Track metrics and demonstrate value with configurable reporting

With integrations for Microsoft SharePoint, Word, Outlook, iManage and OpenText Content Manager, Lawcadia works with the tools your team already relies on.

Lawcadia also delivers enterprise-grade security, AI capabilities, strong data governance, and exceptional customer support, so legal teams can confidently operate at scale.

Headquartered in Australia with global operations, Lawcadia is the strategic partner for legal teams seeking operational excellence and measurable impact.



The Author

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