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In-House Technology Checklist

*Are your current legal tech solutions
optimizing your team's success?*



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In our 2022, Bigfork Tech Legals Ops Benchmark Survey we found that having the right legal tech was critical to legal team's day-to-day work. How does your current solutions fare to our checklist?

1. Are you overwhelmed and struggling to see all your deadlines in one place?

Yes No

Stay organized and manage your work more effectively with visualization of upcoming deadlines. ALOE's Kanban view or traditional calendar, tracks your tasks and deadlines. No more jumping from emails and physical calendars. You can see your due date along with any necessary task information all in one place, never get lost again.

2. Are you tired of chasing your internal customers around to get the information you need from them? Or them waiting on next steps from you?

Yes No

With intake forms, email integration, and repositories, you won't have to chase after internal clients for status updates or log activity with a contract lifecycle management (CLM) solution. Providing your team intake forms creates a unified approach toward record keeping and data. An email integration allows your team choices but sends all your information to a central location. A repository allows information to be stored and retrieved from anywhere at any time. It's important to keep internal customers informed and have your team on the same track to provide maximum efficiency.

3. Are you hoping to start or improve tracking of contract KPIs?

Yes No



Managing contracts effectively takes more than communicating with clients and hitting deadlines. A powerful and customized contract lifecycle management process will have reporting features and key performance indicator (KPI) capabilities. Reporting and overseeing the performance of your contracts helps you gain valuable insights on how to improve your current contracting processes and identify where areas of opportunity might exist. Strong reporting also allows for transparency amongst your team and clear communication within a workflow or project pipeline.

4. Do you need a central place to securely store all of your documents and contracts?

Yes **No**

Stay away from having a bunch of different legal tech solutions each designed for a different function. This is costly, complex, and ineffective. Shared drives also lack the security control often required by the sensitive nature of legal documents. ALOE prides itself on being an all-in-one solution that calendaring, case management, email integration, project management, team communications, emails, integrations, a strong repository, document management, and automation, as well as being secured, and accessible from anywhere.

5. Are you working from the same, most recent version as others on your team?

Yes **No**

Version control means knowing what version of a contract your team is currently working on, and when your clients have signed at a particular moment in time. Your CLM should be able to tell you who was the last user to edit a document, when they did the edit, access previous versions of the edit, and allow for redlining within your system. When someone is working on a document locally and has forgotten to update or someone's made unnecessary changes you may want to be able to refer back to previous versions for comparison.



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6. Can you determine with ease which document version is the final version?

Yes **No**

Think about your current system: can you quickly and easily determine which version was a signed agreement? For most companies, the process to determine which version was signed by a client can be a headache taking a lot of manual time to search, if the signed document can be found at all. Your CLM system should have clear indicators of the current document version with the ability to revert to old versions, if necessary.

7. Can you support remote staff?

Yes **No**

The world has changed and the top talents in the world want flexibility. Your support staff, lawyers, and internal customers are likely to work from a variety of locations — and use different operating systems and devices. The easiest way to reduce friction and productivity delays is moving your team to the cloud — with no IT specialist needed. This saves cost but also makes your company more viable to the best talent.



8. Do you struggle leaving on vacation because your work is siloed?

Yes No

With a combination of good business practices and a documented workflow, lawyers can assign tasks while away to their colleagues to avoid disrupting deadlines and workflow. ALOE provides project management features that can be broken into connected subtasks or related tasks so your team can optimize its efficiencies. Meaning, no added stress when employees go on vacation.

9. Does your enterprise legal tech solution integrate with other tools?

Yes No

Integration with popular platforms like, Outlook, Office 365, DocuSign and other tools reduces duplicated work and the need to jump between systems. The right integrations can speed up workflows by removing unnecessary manual up/downloads. ALOE comes with integrations into Outlook, Office and DocuSign out of the box, and has a Zapier integration to easily integrate into other systems. This also allows some users who are slower to move into a new system the ability to work within Outlook but still send necessary information back to your CLM. What solutions are your provider suggesting for integration that are not included? For example, our top-notch dev team is on hand to create custom integrations to ensure your ALOE solution works exactly how you need it to. This can be a major advantage when deciding to work with a specific provider who could put that development burden on your plate.



10. Have you eliminated your paper documents & storage?

Yes No

Legal teams are no stranger to containers and containers of paper legal documents. This creates a nightmare for the retrieval process and puts your team at risk of losing important information. Not only that, but it creates a compliance and security risk issue. Going digital reduces the need for storage, improves version control, is eco-friendly, secure, and ensures everyone has the most up to date information, whenever they need it.

11. Are your legal technology solutions ready for adaptation, scaling, and growth?

Yes No

The ability to scale is critical to cost-effective expansion. Cloud-based enterprise legal technologies can both reduce your need for support staff while accommodating the need to expand your caseload or hire additional lawyers. A digital workflow will always be easier to plug in additional team members than offline: there's documented processes, examples from past cases, and more clear communication.

12. Is your client and financial data secure?

Yes No

Collecting and storing sensitive information is more important today than ever. Look for a solution that offers secure client communication and document exchange that encrypts sent data and sits on a secure server. Poor data security can send a company out of business, this is one of the most important things on our checklist that you must have.



13. Is your solution customizable to fit your needs?

Yes No

One size does not fit all, your CLM must be customizable to suit your needs. ALOE, is the only fully customizable contract lifecycle management and project workflow solution that you will actually use. Unlike others, it adapts to the way you work rather than the other way around. ALOE is easy to use with immediate time, money, collaboration, and risk management benefits to you and your team. Moreover, ALOE consolidates all your contract and project management needs on one simple platform by including project tracking, contract and matter management, secure document storage and metrics reporting.

Your Score

0-3 If you said "Yes" to 3 or fewer of the above questions, your legal team probably lacks the necessary tools to successfully grow in the remote era. You may be fine operating as is but could eventually lose up to 9% in revenue due to inefficient practices and loss documents. Trying to manage a legal team in a digital evolving space has no doubt proved a challenge, but you'll likely face bigger roadblocks like retention and maximizing your team's effectiveness. With so many legal teams constantly growing and adapting you don't want your team to be left out of making processes seamless to output better results.

4-7 If you answered yes to about half the questions here, you are on your way to running an efficient, cloud-based legal team. However, you may also lack some key components like digital in-take forms, a secure repository, or automation or integrations. . You may have embraced some remote capabilities, but you may still deal with too many paper documents and your data may be at risk. Ask yourself, how can we remove manual processes to get back lost time from administrative work and reclaim that time toward being a lawyer. You need should make a few changes, that can improve your team's overall workflow, protect your clients, increase productivity and prevent compliance issues.



8-11 Your legal team understands that remote features are the key to flexibility, security, stability, and running a highly effective operation. The old saying “If it ain’t broke, don’t fix it,” is enticing but you never want your team to become complacent. Make sure you are using the right software to get the most ROI for your efforts. Stay current on new software innovations and compliance requirements by checking out other options via demos & trials. Worst case scenario, you go back to what you’ve been doing and best-case scenario you find a better suited alternative that positions your team for success.

Read our whitepaper – Guide to Legal Ops – to learn how to modernize your legal department by using contract lifecycle management software.



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