

Perfect Practice® - Legal Technology Institute
Case, Matter, & Practice Management System Software Study
A Detailed View into the Use of Case, Matter, & Practice Management
Systems in the Legal Profession
 – Fall 2009 –

Grand Prize Drawing
 Five (5) iPhone 3Gs
 Complete & Return by
 October 16, 2009

The purpose of this national study is to provide important information to the legal industry about how legal professionals view and use case, matter, and practice management system software. We have selected your name at random. We know your time is valuable, but your input to this survey is crucial to obtaining credible data, even if you do not currently use case or matter management software.

The survey has been designed to make your entries as effortless as possible. We have estimated it will take approximately 15-20 minutes to complete this survey questionnaire. All those completing the survey will receive the completed Study Final Report (PDF) and be entered into a grand prize drawing: five (5) iPhone 3Gs will be given away. Winners will be notified by December 18, 2009.

Please complete and return the survey to us in the enclosed self-addressed envelope as soon as possible so we may analyze all completed surveys and publish the results. All surveys must be postmarked by October 16, 2009 in order to qualify for the grand prize drawing. Thank you for your time, your consideration, and your valued input to the survey.

This survey is being independently conducted by the Legal Technology Institute at the University of Florida Levin College of Law. Final published results and additional information will be available in the first quarter 2010 at: <http://www.law.ufl.edu/liti/research/cms09>

Please PRINT clearly.

Even if you do not use case, matter, or practice management system software, your input is invaluable to us AND you will be entered into the Grand Prize Drawing.

Section I. General Information about You

(This section must be completed for you to be entered into the final prize drawing; your name and contact information will remain confidential and not sold or provided to anyone.)

Our sincere gratitude to the sponsors of this survey for their generous support and contributions to this project:

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1. Name: _____

Firm/Company: _____

Mailing Address: _____

City, ST, Zip: _____

Phone: _____

Email: _____

2. **Which best describes your title/position?**

- | | |
|--|---|
| <input type="checkbox"/> Managing Partner | <input type="checkbox"/> Legal Assistant |
| <input type="checkbox"/> Partner | <input type="checkbox"/> Paralegal |
| <input type="checkbox"/> Associate | <input type="checkbox"/> Academic |
| <input type="checkbox"/> Legal Administrator | <input type="checkbox"/> Judicial |
| <input type="checkbox"/> Librarian | <input type="checkbox"/> Information Services |
| <input type="checkbox"/> Other _____ | |

3. **Age Range**

- | | | |
|--------------------------------|--------------------------------|--------------------------------|
| <input type="checkbox"/> 20-25 | <input type="checkbox"/> 26-30 | <input type="checkbox"/> 31-40 |
| <input type="checkbox"/> 41-50 | <input type="checkbox"/> 51-65 | <input type="checkbox"/> 66+ |

4. **Gender**

- Male Female

5. **Which of the following publications do you or someone at your firm/law dept read on a regular basis? (Select all that apply)**

- | | | |
|---|--|--|
| <input type="checkbox"/> Legal Trades | <input type="checkbox"/> Inside Counsel | <input type="checkbox"/> Trial Magazine |
| <input type="checkbox"/> ABA Journal | <input type="checkbox"/> Law Practice Magazine | General Business |
| <input type="checkbox"/> ACC Docket | <input type="checkbox"/> Law Technology News | <input type="checkbox"/> BusinessWeek |
| <input type="checkbox"/> ALA Legal Management | <input type="checkbox"/> Lawyer's Weekly | <input type="checkbox"/> Forbes |
| <input type="checkbox"/> ALA News | <input type="checkbox"/> Legal Assistant Today | <input type="checkbox"/> Fortune |
| <input type="checkbox"/> The American Lawyer | <input type="checkbox"/> Legal Management | <input type="checkbox"/> Fortune Small Business |
| <input type="checkbox"/> Corporate Counsel Magazine | <input type="checkbox"/> Litigation Support Today | <input type="checkbox"/> The New York Times |
| <input type="checkbox"/> Corporate Legal Times | <input type="checkbox"/> National Law Journal | <input type="checkbox"/> The Wall Street Journal |
| <input type="checkbox"/> GP Solo Magazine | <input type="checkbox"/> National Paralegal Reporter | <input type="checkbox"/> The Washington Post |

6. **What 3 websites do you visit most often for keeping up to date on the business and practice of law? (Select all that apply)**

- | | | |
|--|--|--------------------------------------|
| <input type="checkbox"/> ABA | <input type="checkbox"/> FindLaw | <input type="checkbox"/> Lawyers.com |
| <input type="checkbox"/> ABA Law Practice Management | <input type="checkbox"/> Law.com | <input type="checkbox"/> LexisONE |
| <input type="checkbox"/> ABA Legal Tech. Resource Ctr. | <input type="checkbox"/> Law Technology News | <input type="checkbox"/> Solosez |

Case, Matter & Practice Management System Survey

Section II.

General Information about Your Practice

7. **Type of practice** (*Select one only*)
- Private
 - Corporate
 - Govt
 - Academic
 - Judicial
 - Not-in-practice
8. **Number of years in practice/position** (*Select one only*)
- 1-2
 - 3-5
 - 6-10
 - 11-15
 - 16-20
 - 21-25
 - 26+
 - N/A
9. **What are your primary practice areas?** (*Select all that apply*)
- Administrative Law
 - Admiralty/Maritime
 - Agriculture Law
 - Alternative Dispute Resolution
 - Antitrust & Trade Regulation
 - Arbitration & Mediation
 - Banking & Finance
 - Bankruptcy
 - Business and Commercial Law
 - Civil Rights
 - Constitutional Law
 - Construction Law
 - Consumer Law
 - Criminal Law
 - Disabilities Law
 - Education Law
 - Elder Law
 - Election Campaign & Political Law
 - Electronic Commerce
 - Employment & Labor Law
 - Energy & Utilities Law
 - Entertainment, Sports & Leisure Law
 - Environmental Law
 - Ethics & Professional Responsibility
 - Family & Juvenile Law
 - General Practice
 - Health & Healthcare Law
 - Immigration & Naturalization Law
 - Insurance Law
 - Intellectual Property Law
 - International Law
 - Litigation & Appeals
 - Military Law
 - Personal Injury
 - Probate & Estate Administration
 - Products Liability Law
 - Professional Malpractice Law
 - Real Estate Law
 - Science & Technology Law
 - Securities Law
 - State, Local and Municipal Law
 - Taxation Law
 - Transportation Law
 - Trusts, Estates, Wills
 - Worker's Compensation Law
10. **Your personal practice is mostly:** (*Select one only*)
- Litigation
 - Transaction
 - 50/50 Litigation & Transaction
 - N/A

Section III.

General Information about Your Firm/law dept

11. **Number of lawyers in your firm/law dept.** (*Select one only*)
- Solo
 - 2-5
 - 6-10
 - 11-25
 - 26-40
 - 41-100
 - 101-250
 - 251-500
 - 501+
 - N/A
12. **Number of employees in your firm/law dept.** (*Select one only*)
- 1
 - 2-5
 - 6-10
 - 11-25
 - 26-40
 - 41-100
 - 101-250
 - 251-500
 - 501+
 - N/A
13. **Number of office locations** (*Select one only*)
- 1 (No Branch offices)
 - 2
 - 3
 - 4
 - 5
 - 6+
14. **In which of the following geographic areas does your firm/law dept have offices?** (*Select all that apply*)
- United States
 - Africa
 - Asia
 - Australia
 - Canada
 - Central/South America
 - Europe
 - India
 - Mexico
15. **How frequently does your case information include documents in a language foreign to you?** (*Select one only*)
- None of my case documents are in a language foreign to me
 - Weekly
 - Monthly
 - Quarterly
 - Annually
 - Less than once a year
16. **If you have had cases containing information in foreign languages, what were those languages?** (*Select all that apply*)
- | | |
|-------------------------------------|-----------------------------------|
| <input type="checkbox"/> Spanish | <input type="checkbox"/> Japanese |
| <input type="checkbox"/> French | <input type="checkbox"/> German |
| <input type="checkbox"/> Portuguese | <input type="checkbox"/> Arabic |
| <input type="checkbox"/> Chinese | <input type="checkbox"/> Greek |
| <input type="checkbox"/> Russian | <input type="checkbox"/> Thai |
| <input type="checkbox"/> Dutch | <input type="checkbox"/> Italian |
| <input type="checkbox"/> Other | <input type="checkbox"/> N/A |

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Section IV.

General Computer Information

17. What is the primary network operating system in your firm/law dept? (Select one only)

- Microsoft Windows
- Novell
- Linux
- Don't know

18. Does your firm/law dept have a wide area network (WAN)?

- Yes
- No
- Don't know

19. Do you have remote access to your office network?

- Yes
- No
- Don't know

20. Type of computer(s) you use at work? (Select all that apply)

- PC desktop
- PC laptop
- Macintosh desktop
- Macintosh laptop
- Netbook
- Don't use computer at work
- Don't know

21. What is the operating system of your primary work computer? (Select one only)

- Microsoft Windows Vista
- Microsoft Windows XP
- Macintosh OS
- LINUX
- Don't know
- N/A

22. Is your primary computer at work equipped with two or more monitors?

- Yes
- No

23. If your primary computer at work is NOT equipped with two monitors, how likely is it you would add a second monitor to your primary work computer in the next twelve months?

(Rate from 1=very unlikely to 5=extremely likely; or N/A)

- | | | | | | |
|--------------------------|--------------------------|--------------------------|--------------------------|--------------------------|--------------------------|
| 1 | 2 | 3 | 4 | 5 | N/A |
| <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |

24. Which of the following word processors are used in your office? (Select all that apply)

- Microsoft Word 2000 or prior
- Microsoft Word 2003
- Microsoft Word 2007
- Corel WordPerfect, ver 11 or prior
- Corel WordPerfect, ver 12
- Corel WordPerfect X3 (ver 13.0)
- Lotus Notes
- OpenOffice
- Other
- Don't use word processor
- Don't know

25. Which word processor program is used most widely in your office? (Select one only)

- Microsoft Word
- Corel WordPerfect
- Other
- Don't use word processor
- Don't know

26. Which integrated desktop office suite is used most widely in your office? (Select one only)

- Microsoft Office
- Corel WordPerfect Office
- Lotus Notes
- Don't use desktop suite
- Don't know

27. Which case management system is used most widely in your office? (Select one only)

- | | |
|---|---|
| <input type="checkbox"/> AbacusLaw | <input type="checkbox"/> Amicus Attorney |
| <input type="checkbox"/> Case Track | <input type="checkbox"/> Client Profiles |
| <input type="checkbox"/> Clio | <input type="checkbox"/> LawBase |
| <input type="checkbox"/> LawTrac | <input type="checkbox"/> Legal Files |
| <input type="checkbox"/> Needles | <input type="checkbox"/> Omega |
| <input type="checkbox"/> PerfectLaw | <input type="checkbox"/> Perfect Practice ® |
| <input type="checkbox"/> Practice Master | <input type="checkbox"/> ProLaw |
| <input type="checkbox"/> Rocket Matter | <input type="checkbox"/> TimeMatters |
| <input type="checkbox"/> TrialWorks | <input type="checkbox"/> Other |
| <input type="checkbox"/> Don't use case management system | |
| <input type="checkbox"/> In-house developed | |
| <input type="checkbox"/> Don't know | |

28. Which time & billing system is used most widely in your office? (Select one only)

- | | |
|---|---|
| <input type="checkbox"/> Aderant | <input type="checkbox"/> Amicus Accounting |
| <input type="checkbox"/> Billing Matters | <input type="checkbox"/> Juris |
| <input type="checkbox"/> Omega | <input type="checkbox"/> PCLaw |
| <input type="checkbox"/> PerfectLaw | <input type="checkbox"/> Perfect Practice ® |
| <input type="checkbox"/> ProLaw | <input type="checkbox"/> RainMaker |
| <input type="checkbox"/> Tabs3 | <input type="checkbox"/> Thomson-Elite |
| <input type="checkbox"/> Timeslips | <input type="checkbox"/> Other |
| <input type="checkbox"/> Don't use time & billing | <input type="checkbox"/> Don't know |

29. Which document management system is used most widely in your office? (Select one only)

- iManage/WorkSite
- OpenText/Hummingbird/eDocs
- WORLDOX
- Don't use document management system
- Don't know
- Other

30. Which of the following types of software or systems are used at your firm/law dept? (Select all that apply)

- Document review tool (e.g. Summation, Concordance)
- Transcript management software (e.g. LiveNote)
- Conflict checking software
- Trial presentation software
- Timeline creation software
- None of these

31. Which electronic mail program is used most widely at your desktop? (Select one only)

- Google gmail
- Lotus Notes
- Microsoft Outlook
- Novell GroupWise
- Don't use email
- Don't know

32. Which of the following types of metadata cleanup software is supplied by your firm/law dept? For example, the software would be used to remove changes tracked by Microsoft Word. (Select all that apply)

- iRedline
- iScrub
- Metadata Assistant
- Workshare Protect
- Other
- My firm/law dept does not have metadata cleanup software
- We have it, but I don't know what it's called

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33. Do you personally use the software to clean metadata from your documents?
 Yes
 No
 N/A
34. If your firm/law dept does not have metadata cleanup software, how likely is it you would purchase metadata cleanup software in the next twelve months?
(Rate from 1=very unlikely to 5=extremely likely; or N/A)
1 2 3 4 5 N/A
35. In which of the following formats do you usually receive case/matter related documents from clients?
(Select all that apply)
 .gif .htm/.html
 .pdf .tif
 paper Excel
 Word WordPerfect
 Other
 N/A
36. Has your practice begun to utilize the available tools for routing and notifications of paperless workflow?
 Yes
 No
 Don't know
37. What percentage of your practice is paperless and is taking advantage of Scanning and Imaging solutions?
(Select one only)
 None 10% 25% 50% 75% 100%
38. What do you use to create PDF documents?
(Select one only)
 Adobe Acrobat (Full version, not 'Reader')
 Conversion in my word processor
 Third-Party application
 Don't create PDF documents
 Don't know
39. What best describes your outlook on training and implementation? (Select one only)
 I prefer live onsite training
 I prefer to send staff to a training center
 I prefer live training sessions over the Internet
 I prefer online tutorials, documentation & movies
 I prefer to figure it out myself on my own time
40. Which Web browser do you primarily use?
(Select one only)
 Microsoft Internet Explorer
 Mozilla Firefox
 Apple Safari
 Opera
 Don't use Web browser
 Don't know
 Other
41. Do you use encryption or other additional security when sending confidential to e-mail clients using the Internet?
 Yes
 No
 Don't know
42. In your opinion, how secure is your current system at work? (e.g. desktop computer, computer network, Internet access, communications)
(Rate from 1=not at all secure to 5=extremely secure)
1 2 3 4 5

Section V.

Case, Matter & Practice Management Systems ("CMS")

43. Does your firm/law dept currently use a CMS?
 Yes
 No
 Don't know
44. If Yes, what triggered your first purchase of a CMS?
(Select all that apply)
 Started new firm/law dept
 Increase in client base
 Increase in number of employees in firm/law dept
 Recommended by a colleague
 To become more efficient (or increase productivity)
 N/A
45. If Yes, how satisfied are you with your current CMS?
(Rate from 1=not satisfied to 5=very satisfied; or N/A)
1 2 3 4 5 N/A
46. If Yes, what first made you aware of the CMS you currently use? (Select all that apply)
 News article Blog
 Direct mail piece Email
 Product review Internet search
 Company website Colleagues
 Salesperson Trade show display
 Advertisement in a newspaper or magazine
 N/A
47. If your firm/law dept does not currently use a CMS, how likely is it that your firm/law dept would consider a CMS in the next 12 months?
(Rate from 1=very unlikely to 5=extremely likely; or N/A)
1 2 3 4 5 N/A
48. Whether or not you currently use a CMS, what do you see are the primary perceived barriers in your firm/law dept regarding use of CMSs? (Select all that apply)
 Don't see the benefits of CMSs
 Current method works, not worth changing
 CMSs are not a cost-effective solution
 Concern about integrating CMS with current technology
 Concern about quality and support of a CMS
 Cost of maintaining a CMS
 Cost of computer upgrades to support a CMS
49. What do you consider to be the biggest problem with CMSs?
(Select one only)
 Integration into the firm/law dept
 Reliability
 Too complex
 Not enough functionality
 Support, Service
 Total Cost of CMS
50. How important is it for your CMS to seamlessly function with Microsoft Outlook for:
(Rate each one from 1=not important to 5= most important)
1 2 3 4 5
Contacts
Appointments
Tasks
Email
51. How important is it for your practice to have an integrated one vendor solution for front office and back office functionality? (Rate from 1=not important to 5= most important)
1 2 3 4 5

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52. How important would it be to have a document management system incorporated into your CMS if it meets 90 percent of the functionality of a "best of breed" document management system?

(Rate from 1=not important to 5= most important)

1	2	3	4	5
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

53. How well versed are you in your current CMS?

(Select one only)

<input type="checkbox"/> Expert	<input type="checkbox"/> Advanced
<input type="checkbox"/> Intermediate	<input type="checkbox"/> Beginner
<input type="checkbox"/> N/A	

54. What is your preferred method of support for CMS software? (Select one only)

- Email only
- Outsourced call center
- Automated call answering (voice mail)
- Interactive Web Support
- A real, live support rep on the telephone
- I don't care, whichever is least expensive

Section VI.

Software as a Service ("SAAS")

55. How concerned are you about the following Internet issues?

(Rate from 1=not concerned to 5=extremely concerned)

	1	2	3	4	5
Speed, performance	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Computer viruses	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Secure transactions	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Email security	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Confidentiality	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Internet reliability	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Content authenticity	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Integration with other applications	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

56. Is your firm/law dept considering hosting your software and data on-line? (Rate from 1=not likely/not interested to 4=very interested and will consider it, or 5=already implemented)

	1	2	3	4	5 (Already)
	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

57. How do you feel about hosting your attorney/client privileged data in a web-based program? (Select one only)

- I think it is Malpractice, nothing online is secure
- I don't think it is Malpractice, but I wouldn't do it
- I trust my IT staff to keep data secure and cover my liability
- My clients and I are comfortable with online client data

58. Which of the following best describes your thoughts on outsourcing to a foreign country? (Select one only)

- It is likely a breach of attorney/client privilege
- It is very cost effective due to the lower wages
- It is not cost effective due to communication difficulties
- I would never outsource

59. In the past 12 months, has your firm/law dept been through discovery of sufficient size to warrant the use of a vendor to host the document review?

<input type="checkbox"/> Yes	<input type="checkbox"/> No
<input type="checkbox"/> Don't know	

60. If not, how likely is it within the next twelve months that your firm/law dept will consider using a hosted document review tool to manage case information?

(Rate from 1=very unlikely to 5=extremely likely)

1	2	3	4	5
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

Section VII.

Future, Computer Department & Budget

61. How many people are in your firm/law dept computer department? (Select one only)

- None
- 1
- 2-5
- 6-10
- 11-20
- Over 20
- Don't know

62. What is the responsibility of your firm/law dept computer department staff? (Select all that apply)

- Recommend technology
- Purchase technology
- Hardware installation
- Software installation
- Network installation
- Hardware maintenance
- Software maintenance
- Network maintenance
- Training
- Help desk support
- Don't know
- N/A

63. Who at your firm/law dept has primary responsibility for researching software? (Select one only)

- IT Department
- Managing Partner
- Office Manager / Legal Administrator
- Software / Technology Committee
- Staff Members using the software
- Other
- Don't know

64. When considering a CMS, who within your firm/law dept has significant input into the decision? (Select all that apply)

- IT Department
- Managing Partner
- Office Manager / Legal Administrator
- Software / Technology Committee
- Staff Members using the software
- Other
- Don't know

65. If you are involved in software purchase decisions in your firm/law dept, where does your firm/law dept look for or find information on new software technology?

(Select all that apply)

- Local bar associations
- Technology trade shows
- Vendor websites
- General Internet search
- Technology publications
- Blogs
- Listservs
- Recommendations from colleagues
- White papers
- Other
- I don't look for or find information on new software technology
- I am not involved in software purchase decisions

66. How important are each of the following in your firm/law dept's software purchasing decisions?

(Rate each one from 1=not important to 5= most important, or N/A)

	1	2	3	4	5	N/A
Case studies	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
White papers	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Customer references	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Software trials	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

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67. **How often does your firm/law dept evaluate new technology and software available in the marketplace for your practice.** (Select one only)
- 6 Mo 1 yr 2 yr 3yr 3yr+ N/A
-
68. **Do you personally feel your firm/law dept keeps up-to-date with technology?**
- Yes
 No
69. **What is important to your firm/law dept when selecting new technology for your practice?** (Rate each one from 1=not important to 5= most important)
- | | 1 | 2 | 3 | 4 | 5 |
|--|--------------------------|--------------------------|--------------------------|--------------------------|--------------------------|
| Ease of use | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| Robust application features | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| Ability to customize | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| Simplicity w/ little or no customization | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| Handles only one specific task | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| Integration with existing technology | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| Account for jurisdictional differences | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| Remote access options | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| Availability of hosting option | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| Vendor industry standing | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| Vendor familiarity/experience | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| Personal relationship w/ vendor | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| Free implementation support | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| Free training | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| Free technical support | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| Pricing of software | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| Pricing of services/maintenance | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
70. **How does your firm/law dept determine if a software package is too expensive?** (Select one only)
- Compare it against other software vendors' prices
 Estimate total cost over five years
 Compare it to the value of all the functions I want it for
 Compare it to the cost of the people's time the software will free up or replace
 Other
71. **What percentage of your firm/law dept gross revenue is spent on technology, not including IT salaries?** (Your best estimate is okay; Select one only)
- <1%
 1% to <3%
 3% to <5%
 5% to <10%
 10% or greater
 Don't know
72. **What is the main reason you would consider leaving your current CMS software?** (Select one only)
- Adding upgrades and users is too expensive
 My current software does not meet our needs
 My current software is not very user-friendly
 Upgrades of my current software are too painful
 My current software is unreliable
 No need to change
73. **If your firm/law dept installed a CMS, when would you expect the Return on Investment (ROI)?** (Select one only)
- Immediate
 Within 3 months
 Less than 1 year
 More than 1 year
 No expectations
 N/A
74. **Is your firm/law dept thinking about implementing a Client Relationship Management (CRM - not CMS) system in the next twelve months?**
- Yes
 No
 Don't know
 We already use a CRM
75. **Does the culture of your firm/law dept provide for sharing client and case/matter data, even though attorneys don't necessarily work on the same case/matter?**
- Yes
 No
 Don't know

Thank you for participating in this CMS survey conducted by the Legal Technology Institute.

If you have any comments: