

**Case, Matter, & Practice Management System
Software Web Site**

Sample CMS Reference Questions & Checklist

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Person Completing Checklist:

Date:

Product Name:	Company:
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Reference Information

Firm:	
Contact:	
Phone:	email:

Reference Computing Environment

Firm Size: Small - Medium - Large	# Offices:	# Users:
Type Practice: Private Corporate Law	Government Law	Other
Local Area Network: Novell Netware (version)	Windows NT (version)	Other (version)
Workstations: PC Macintosh	Wide Area Network? Y/N	

Reference Installation History

How long system in use?
How was the system phased in?
How long was the firm "down?"
How long to implement the full system?
Who did the installation?
Was IT trained prior to installation?

Company Training & Support

Training Requirements?			
How was the training?	Poor	Adequate	Exceptional
Did everyone receive training?	Training Materials Provided?		
What is the average response time from vendor to correct a problem?			
How is the support?	Poor	Adequate	Exceptional

General

Overall Comments?
Any technical or compatibility issues?
Any management issues?
Any stumbling blocks?
Is the system a good fit for the firm?
How have the users adapted to the new system?
Would you recommend the company?
Notes: