

**Table 1: Sales Process Stages and Tips in CLI Blog Post: *A quick guide to purchasing legal technology in 2021 – Stage 2: Evaluation* by Sam Burrett**

Step	Description	Explanation / Tips
Discovery Call	<p>The first step when engaging a technology vendor is generally a 'Discovery Call.'</p> <p>In this call you will likely be speaking with a Sales Development Representative (at a larger company) or an Account Manager/Director (at a smaller company).</p> <p>The representative's job will be to qualify you as a potential buyer of their product. For example, many companies use a process called BANT, screening for Budget, Authority, Need and Timeline.</p> <p>They will ask questions to ensure that you do in fact have a problem their solution can help with, and that you can make a purchasing decision.</p> <p>The Discovery Call is a good opportunity to outline the problem you are trying to solve and discuss your envisaged solution. As you discuss the issue at hand, you'll have the opportunity to evaluate the suitability of the vendor - just as they are doing for you.</p>	<p>The initial call is usually a fact finding exercise for the vendor, which can be frustrating for lawyers who have prepared a plan and have pressing questions about the vendor's solution.</p> <p>By knowing the aims of a Discovery Call, you can speed up the process and more quickly access the information you need.</p> <p>Here are some tips to help you get the most out of a discovery call and star the process on the front foot:</p> <ul style="list-style-type: none"> <li>• <b>Share a summary of your one page plan and wish-list.</b> This will help the vendor answer their qualifying questions and confirm that their solution is suitable</li> <li>• <b>Ask for an Account Manager or a Senior Sales Development Representative to join the call.</b> More senior salespeople will recognise a motivated, informed buyer and will ensure you have a good experience through the process.</li> <li>• <b>Don't expect too much from the initial call and be willing to be guided by the vendor.</b> Most salespeople have to follow certain processes to move their prospects through a pipeline, especially in larger organisations. If you are willing to follow the steps early, you will build a productive working relationship that will pay dividends down the line.</li> </ul>

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<p><b>Demonstration</b></p>	<p>The demonstration (demo) will be one of the key meetings in the vendor engagement process.</p> <p>The demo is usually a 1-hour run-through of the vendor's product, highlighting the key features. It is often pitch-heavy and driven by the vendor.</p> <p>However, lawyers should feel empowered to shape the demo and make sure they have done sufficient homework to be able to requesting specific features be highlighted and asking questions.</p>	<p>The most important principle for making demonstrations effective is to take an active role. Allowing the vendor to run through their standard sales pitch risks wasting time on irrelevant problems.</p> <ul style="list-style-type: none"> <li>• <b>Have the right people on the call</b> – you and your specialists – the people who know and understand not just your business case but can translate any jargon as well!</li> <li>• <b>Raise issues of interoperability, integration and security early.</b> If you find that a platform doesn't talk to your existing technology, or isn't up to your IT Team's requirements, you will need to quickly look elsewhere.</li> <li>• <b>Reiterate your key challenges and requirements ahead of the call.</b> This might include circulating your wish-list and one page plan via email or discussing the problem again at the start of the call.</li> <li>• <b>Pick 2-3 key features to focus on.</b> A quick look at the vendor's website or marketing materials should provide you with some insight into the most relevant features for your situation.</li> <li>• If possible, <b>ask for a 'hands-on' demo or access to a demo environment.</b> While not all vendors will have a demo environment or be willing to hand over the reins in the first demo call, it can be really helpful to get access to the platform to explore the features yourself.</li> </ul>
<p><b>Follow up materials</b></p>	<p>Following the demonstration, the vendor will likely send through a range of materials to follow up the conversation, which may include:</p> <ul style="list-style-type: none"> <li>• A recording of the presentation;</li> <li>• The slide deck</li> <li>• Marketing material</li> <li>• Screenshots of the product</li> <li>• Pricing</li> </ul> <p>Some vendors may also offer a free trial period.</p>	<ul style="list-style-type: none"> <li>• Product materials can become a critical part of your business case, and you should feel empowered to request additional material from your vendor.</li> <li>• For example, internal stakeholders might appreciate a recording of the presentation and screenshots of the product.</li> <li>• In addition, pricing will form a critical part of the decision making process, and should be requested from the vendor during or following the demonstration process.</li> <li>• Remember - your requirements impact pricing and you want to have been consistently asking the same questions so comparisons here can be accurate. It's also one of the main benefits of having an RFP and seeing its completion by vendors</li> <li>• As with the 'hands on' demo above, a free trial period is extremely valuable. Many legal technology products are complex and multi-faceted, and the ability to dive into the product over the trial period can be hugely beneficial to ensuring you choose the right product.</li> </ul>

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<p><b>Second demonstration &amp; sales call</b></p>	<p>It is common to hold a second demonstration or sales call to follow up the initial demo. This second session might include:</p> <ul style="list-style-type: none"> <li>• A deeper dive into a particular feature (or features) of the product</li> <li>• Detailed discussion about implementation, including integrations and add-on functionality</li> <li>• Negotiation on pricing</li> <li>• Discussion about timing and processes</li> </ul>	<p>Be aware that many legal technology companies will only provide an overview of the product in the first session and use that as a hook to provide you a more detailed follow up session. In most cases a second call will be necessary, but should be more tailored and driven by you (in contrast to the first call).</p> <p>Here are some tips to consider at this stage:</p> <ul style="list-style-type: none"> <li>• It may be helpful to push the second call out beyond the recommendation of the vendor. If you have the ability to view a number of different products before this second call, you will be able to ask more pertinent questions of each vendor.</li> <li>• Prior to the second demonstration, hold an internal meeting to ensure buy-in from relevant stakeholders, seek feedback on the first demo and (if possible) run through a short list of options.</li> <li>• Use this as an opportunity to get to know the vendor's company and evaluate cultural fit. For example, you might ask about the company's expansion plans, investor funding, features in development, etc.</li> </ul>
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