

Table 2: Legal Technology RFP Considerations in CLI Blog Post:
A quick guide to purchasing legal technology in 2021 – Stage 2: Evaluation by Sam Burrett

LEGAL TECHNOLOGY RFP CONSIDERATIONS	
Accessibility	<ul style="list-style-type: none"> • How is the platform accessed? For example, can it be accessed remotely, or must it be installed locally? • Can it be accessed via mobile, or only via desktop? • Can non-legal users interact with the platform? • Does the system have the capacity to prescribe delegation of authority (i.e. to determine what individual users, or groups of users can see on the platform?) Can delegations of authority be updated manually or automatically, without input from the vendor? • Can we set usage controls and ensure confidential information is limited to approved users? • Can we extract key information (including documents and reports in a useable form? How does this process work? Does it require vendor involvement?
Cost of ownership	<ul style="list-style-type: none"> • What is the licence/pricing structure? • What is included with the fee? • What are the set up costs, if any? • Are there support fees? Customer service fees? • What fees might be required for add-ons in the future? • How many hours will be required from our company to run the software (per week)? • How many hours might be required for IT support (per week)?
Data, reporting and analytics	<ul style="list-style-type: none"> • What reporting / analytics capabilities does the software have? • Does the software capture all relevant information for our team and for other internal stakeholders? • Is information presented in an accessible, easy to understand way (for example with graphs and visuals)? • Does it have the ability to filter results, run reports and export to a CSV/Excel file for further manipulation/interpretation?

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Improvements	<ul style="list-style-type: none"> • How much has been invested in the technology so far? What is the projected R&D spend? • What new features have been delivered recently? • What is the product/feature roadmap (i.e. what features are coming in the future)? • Is there a process for suggesting new features? • How are new versions/updates added to the system? What is the expected downtime?
Security considerations	<ul style="list-style-type: none"> • What authentication methods are available (for example two factor authentication, delegated authentication)? • Is data encrypted? How? • What is the back up process? How do you ensure no data is lost? • What security programs are followed? (For example, ISO compliance) • Is there independent, third party testing/auditing of security/data processes? • Where is the data hosted? Is there an option to host data in a specified location/country?
Support	<ul style="list-style-type: none"> • What types of support are available? (e.g. 24x7 support?) • Is the support in-platform, or does it re-direct to our legal team? (i.e. will users be speaking with the software company's team, or with our legal team?) • Are we assigned a dedicated account / customer success manager to help with implementation and expansion in the future? • What training is available for legal and non-legal users? Can the training be tailored? Can it be accessed on demand?