Why Law Firms Must Stop Choosing Software Without Expert Guidance

Too often, law firms make critical software decisions without conducting a proper needs analysis or involving an expert to vet the vendor. The result? Costly mistakes, data loss, and operational disruption.

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The Hidden Costs of Choosing the Wrong Software

When law firms select software based on sales pitches or popularity—without understanding their unique needs—they risk:

Incomplete Data Migrations

Many firms discover post-implementation that their historical billing and ledger records weren't migrated. One firm recently paid **$11,000** just to extract data from a system that failed. That didn't even include the **nearly 1 million documents** stored in the system.

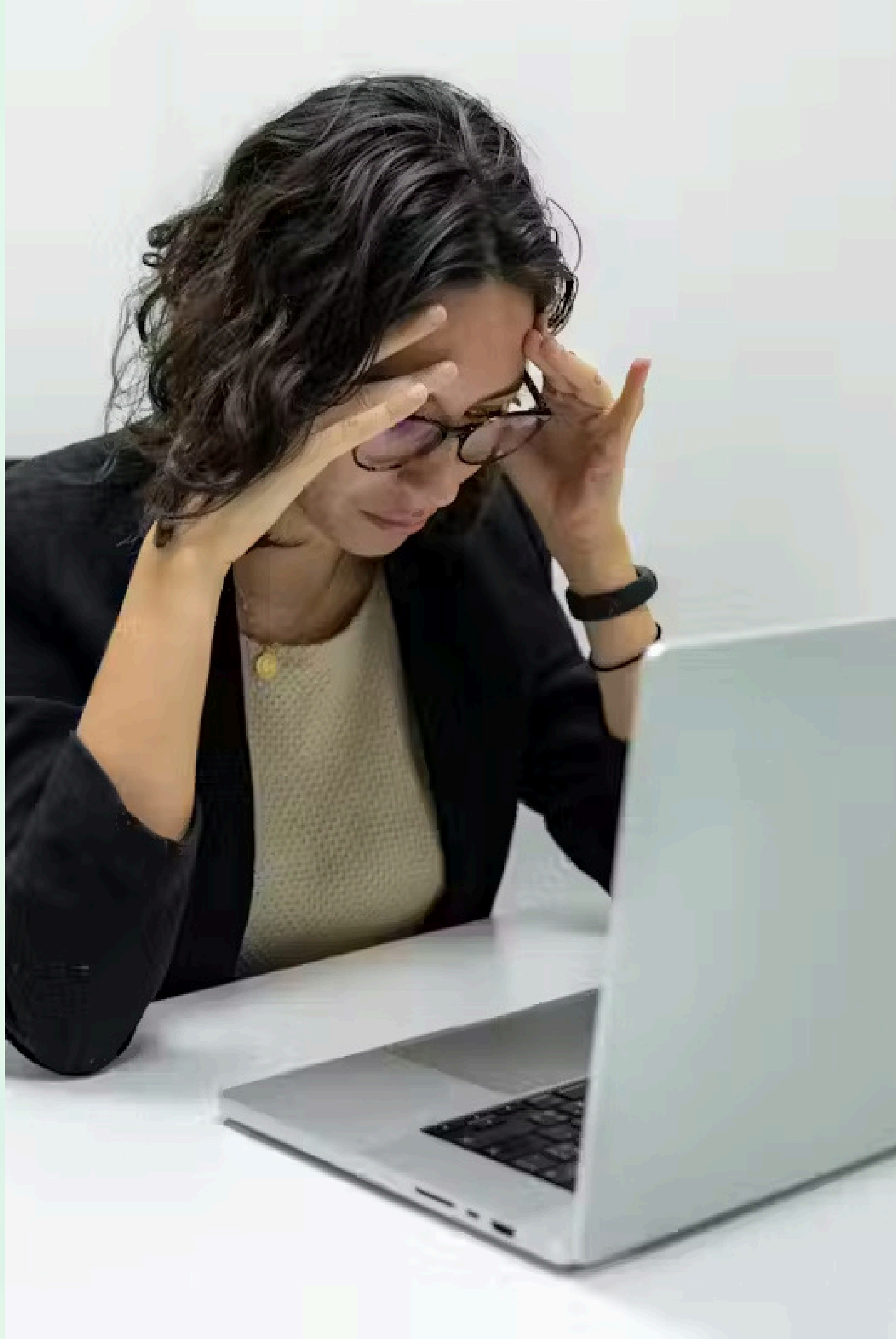
Vendor Lock-In

Software companies often encourage firms to store **everything**—documents, emails, CRM data, — Merchant data within their proprietary platforms. They even push their own merchant solutions over industry standards like LawPay. This makes switching systems later **expensive, complex, or even impossible**.

The Danger of "Free" Migrations and Training

"Free migration" and "online tutorials" may sound appealing, but they're **not a substitute for professional implementation**—especially for firms with more than 10 attorneys. These offers often:

- Skip critical data (like billing history)
- Fail to account for firm-wide workflows
- Leave staff undertrained and unsupported



Sales Teams vs. Strategic Fit

Software sales reps are incentivized to close deals—not to ensure long-term success for your firm. They're not trained to assess:

- Stakeholder needs across departments
- Integration with existing systems or work process.
- Long-term scalability and data ownership

In some cases, reps are even **terminated mid-deal**, leaving firms stranded during implementation.

What Law Firms Should Be Demanding

To avoid these pitfalls, law firms must prioritize:

Independent APIs

Choose systems that integrate with widely supported platforms like **NetDocuments**, **Microsoft SharePoint**, or **iManage** for documents. **HubSpot**, or ***Lawmatics*** for CRM are few options of many. This ensures flexibility and control over your data.

CRM Ownership

Your CRM data should remain under your control, not locked into a proprietary system that handles your billing, accounting and case management roles.

Expert-Led Needs Analysis

Before signing any contract, engage a technology expert who understands law firm operations and can match your needs with the right solution. Every Tech project requires the software and independent expert to deploy, train and support the law firm.

The Consequences of Getting It Wrong

When law firms choose the wrong software:

- They often have to **maintain two systems**—the failed one and the new one—at additional cost.
- They lose access to historical data, impacting **conflict checks**, **reporting**, and **compliance**.
- They face **disruption across departments**, from billing to case management.

How Resource Advisors Can Help

At **Resource Advisors**, we conduct **comprehensive needs analyses**, first, vet the vendors, and manage migrations with precision. All without extensive marketing out reach. Our partners follow our process .Our goal is to ensure your software investment supports your entire firm—not just one department or a short-term fix.