



# The Legal Case Management Buyer's Checklist: What to Ask Before You Commit

## THE LEGAL CASE MANAGEMENT BUYER'S CHECKLIST:

# What To Ask Before You Commit

Choosing a legal case management system is a high-stakes decision—one that can either streamline your practice or cause serious operational headaches. Before you commit to any platform, it's critical to ask the right questions—not just about features, but about the things that truly affect your firm's long-term success: security, customer support, data conversion, document migrations, and more. Consider an unwillingness to share answers to any questions to be a major red flag; any reputable platform should be more than willing to respond honestly.



## What security precautions do you have in place to protect my data?

Security should be one of the very first topics you raise when evaluating a case management vendor. Any credible platform must have a comprehensive security framework in place—this includes essentials like two-factor authentication (2FA), single sign-on (SSO), granular user permissions, data encryption, and regular security audits. Your clients trust you with their most sensitive information, so your software partner must treat that data with the highest level of protection.

**Pro Tip:** Even the most secure systems are only as strong as their users. Law firms are often compromised not through complex hacks, but through a single click on a malicious email link. Implement a clear, firm-wide cybersecurity policy—and make sure your team is trained and held accountable for following it.

## Can I speak to a current customer?

Any reputable case management provider should be eager to connect you with a satisfied client. Speaking to a current user offers a candid, unfiltered perspective on what it's like to work with the platform on a daily basis. If a vendor hesitates to provide a reference, take it as a red flag.

When you connect with a reference, go beyond surface-level questions.

Ask things like:

- What would you change about the platform?
- How responsive is their support team?
- How has the platform supported your firm growth?

These insights can help you gauge the vendor's true level of service and transparency.

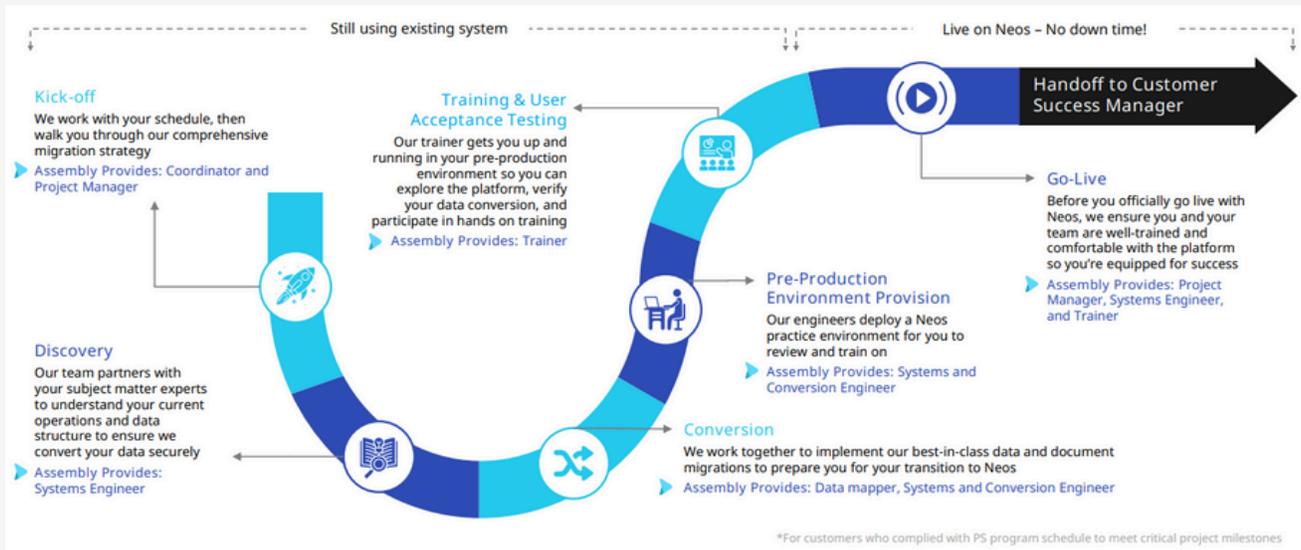
## Tell me about your transition process

Data migration is one of the most overlooked—yet most critical—elements of switching case management systems. A smooth transition should include document migration, accurate data conversion, and a well-defined timeline that ensures your firm is operational on day one.

Ask for specifics:

- How is your existing data structured and imported?
- What safeguards are in place to prevent data loss or corruption?
- Who will be guiding your team through the transition?

Be cautious of vendors that outsource this process to third parties. They may lack familiarity with the software and may not be equipped to answer technical or process-related questions.



At Assembly, all transitions are handled in-house by a team deeply familiar with our platform. We also provide a pre-production environment, giving customers a safe space to get comfortable before going live. Our patent-pending transition process is designed to keep firm data intact without interrupting critical workflows.

## How will the platform scale with my firm?

Keep your firm's growth trajectory in mind. If you plan to scale, choose a platform that can grow with you. Even if you're a smaller firm today, you want software that won't limit you tomorrow.

### Questions to ask:

- How does your platform support firms as they grow in size and complexity? (E.g., more users, more cases, more practice areas)
- Are there any limits on the number of users, cases, or documents the system can handle?
- Can we customize workflows, permissions, and reporting as our processes evolve?
- Are there additional costs or technical limitations tied to scaling up (especially when it comes to document storage)?

## How do you incorporate customer feedback into your software?

The best software companies listen to their users. Ask whether the vendor has a formal feedback process and how often that feedback translates into product updates. Can they point to specific features that were developed based on user input?

Customer needs evolve—and your software should too. A vendor that prioritizes feedback is more likely to deliver a product that stays relevant over time.



## How many new features do you add to your product each year?

Feature frequency isn't just a vanity metric; it speaks to the vendor's commitment to innovation. Some platforms roll out updates monthly, others quarterly. The cadence matters less than the quality and impact of those updates.

Ask how new features are communicated to users. At Assembly, we announce each release with detailed documentation, instructional videos, and live webinars. That way, customers know exactly what's new, how it works, and how to implement it.

**Product Releases**

LEGAL TECH  
What's New: Neos March 2025

LEGAL TECH  
What's New: Neos January 2025

LEGAL TECH  
What's New: Neos December 2024

LEGAL TECH  
What's New: Neos September 2024

LEGAL TECH  
What's New: Neos August 2024

**What's New in Neos**

March

Hello,  
New Neos features will be released tonight!

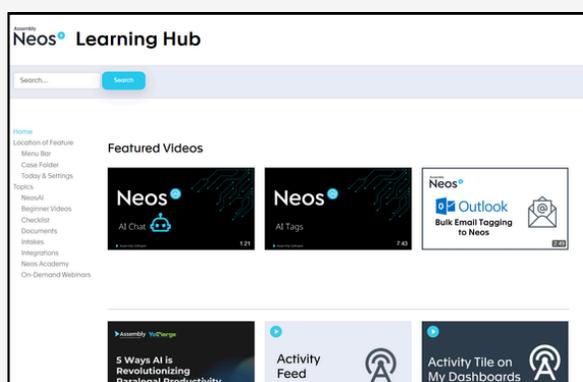
**Features**

- **Variable Interest Calculator:** Provides users with the option to calculate interest using one interest rate for all values or variably by month.
- **Auto-Populate Subject Line:** Email and Case Calendar: When users create new emails or calendar events, the Case Name and Case Number will automatically populate the subject line.
- **AI Notes Summary (NeosAI Platinum only):** Summarize individual or multiple notes using AI as well as receive suggested next steps, saving time and improving productivity.
- **Include Case Information in NeosAI Chat (NeosAI Platinum only):** Users can now select the data sources to use for NeosAI Chat conversations and include the current list they are viewing to ask questions about these records.
- **Include Dynamic Forms in NeosAI Document Generation (NeosAI**

## What type of training and educational resources do you offer?

Adopting new software is only successful if your team knows how to use it. Ask about onboarding training, access to ongoing education, and whether training is conducted in-house or by third-party providers.

A strong vendor will offer a comprehensive knowledge base, regularly updated video tutorials, and live sessions to ensure users are supported at every stage. Outdated or hard-to-find help content is a sign that the vendor focuses more on selling than on supporting long-term success.



## Tell me about your customer support team

Responsive, knowledgeable support can make or break your experience with a platform. Ask if the support team is in-house or outsourced. What channels can you use to contact them—phone, email, live chat? What's the typical turnaround time for resolving issues or even first contact after a ticket has been submitted?

Don't forget to ask about support team retention. A high turnover rate often leads to inconsistent service. Great vendors invest in their support teams, just like they invest in their software.

The reality is no software is perfect—but a well-supported platform can still feel seamless. When problems arise, you want a partner that's equipped and ready to help.

At Assembly Software, we take pride in our U.S.-based expert support team—responsive, experienced professionals who know our platform inside and out and are committed to your success.

Average of

**15**

Minutes to Engage  
with the Client After  
a Ticket has Been  
Submitted

Over

**80%**

Of all Calls are  
Answered in  
less Than  
40 Seconds

**96%**

Customer  
Satisfaction Score

**78%**

Of Tickets  
Closed in 24hrs

## Ask about their AI data management and practices (even if you aren't planning to use AI...yet)

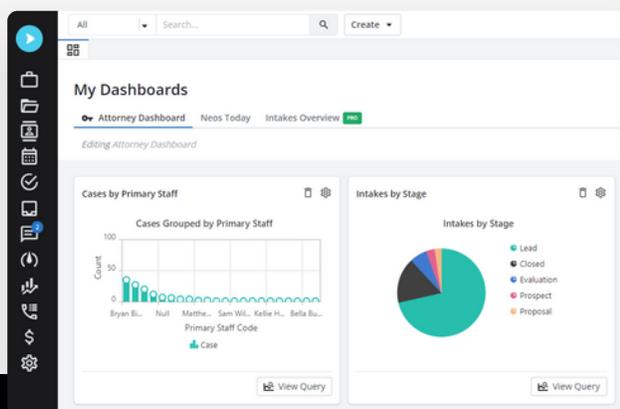
Whether you're eager to embrace AI or still exploring its potential, it's essential to understand how any case management platform you're evaluating integrates AI into its product. As AI capabilities grow, so do the privacy and ethical considerations around data usage, model training, and access controls. Before committing, ask your vendor pointed questions about how AI is used, who has access to the data it touches, and what safeguards are in place to protect your firm and your clients.

### Questions to ask:

- Will any of our data be used to train your models?
- Is our data ever pooled with data from other customers or sources?
- Do you use third-party AI models or services (e.g., OpenAI, Anthropic, etc.)? If so, how is data shared and protected?
- Can you confirm that our data will not be accessed by your employees or contractors unless explicitly authorized by us?
- Can AI features be toggled off or limited by user role or permission settings?
- How do you ensure compliance with data privacy regulations (e.g., GDPR, HIPAA)?

**At the end of the day, choosing a case management platform isn't just about software—it's about finding a partner that understands your firm's needs and is committed to your success.**

The questions in this post are designed to go beyond the sales pitch and help you uncover how a vendor really operates, supports its customers, and evolves over time. Take your time, dig deep, and don't be afraid to walk away if the answers don't instill confidence. Your clients—and your team—deserve a system that's secure, scalable, and built to support your growth.



If your firm would like to learn more about Neos, contact Assembly Software at [sales@assemblysoftware.com](mailto:sales@assemblysoftware.com)

[Get Consultation](#) ▶