

Q: Number of users?

Help me understand how many people in the firm will be using the software? We count users as each person that will have his/her own username and password so they can securely access their calendar, bill for their time, and access the firm's case files, notes and documents/emails based on their security profile.

Q: How they use their current platform?

- How are you managing a shared calendar now?
- Do you have a document management system that helps manage access and document versions?
- Do you track time using a different system now?
- How do you handle the firm's accounting (AR, GL (payables, vendor information, etc.))?
- How do you manage the high volume of email so you stay organized and you can share important information and attached documents?

Q: Location of applications / IT?

Do you run your legal applications on your computer or in the cloud? Does the firm own a server at the office? Do you mind sharing how much you are spending for a 3rd party IT consultant? Are you considering moving to the cloud now or in the foreseeable future?

Q: Are you the decision maker?

If you like the benefits of Abacus software that we discuss today, would you make the decision to authorize the deal?

If not...

Are you part of a team that is evaluating a legal technology solution for the firm? If so, do you mind helping me understand who the other team members are and what are their roles?

If other decisionmaker identified...

Would it be helpful to have (decisionmaker) involved in our conversation to ask questions and hear the information we discuss firsthand?

Q: Timeframe?

If you like the benefits of Abacus software that we discuss today, when would you be able to sign an agreement to help us get you up and running as efficiently as possible?

Q: Budget?

Do you have a sense of the budget for your legal technology solution based on your current spend and your short- and long-term growth and profitability goals? It often helps me match you to an appropriate solution when I know how much you are spending now.