**Discussion Guide - Law Department Technology**

**Technology in general:**

* What existing law department owned technology do you use?
* Are there defined processes related to its use?
* What additional processes and/or technology could improve your productivity and effectiveness?
* What non-law department owned technology do you use?

**Matter Management and eBilling:**

* How do you access the system?
* How do you use the system?
* Do you create/update matters?
* Do you review and approve invoices?
* Do you create matter status updates?
* Do you use any standard reports from the system?
* Do you maintain offline/manual supplemental files that should be tracked in the system?

**Document Management:**

* How do you access the system?
* How do you use the system?
* Do you create folders or workspaces?
* Do you search the system?
* Do you use any standard plug-ins (e.g., Office)?
* Do you use any other platforms or technology to manage documents (e.g., file sharing)?
* Do you maintain offline/manual supplemental files that should be tracked in the system?
* For any offline/manual files, do you adhere to the corporate document retention policy?

**Contract Management:**

* How do you access the system?
* How do you use the system?
* Do you use the system to create, negotiate/approve, or execute/manage contracts?
* If you create contracts:
	+ What are the typical steps involved?
	+ How is the process triggered?
* If you negotiate contracts:
	+ Do you wish to capture all negotiation versions in the system, or only the final version?
	+ When does a contract go for approval?
* If you execute/manage contracts:
	+ How do you obtain signatures?
	+ Is DocuSign (or another tool) used for e-signatures?
	+ How are amendments or changes to negotiated terms handled?
	+ Where are contracts stored for management?
* What are your reporting needs for contracts?

**Expert Systems**

* Do you use any of the following systems?
	+ Intellectual Property Management
	+ Entity Management
	+ Board Management
	+ Ethics & Compliance
	+ eDiscovery
	+ Immigration