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A Proceed Service

# The Definitive Buyer's Guide for Litigation Support Service Software

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## Introduction

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### What is litigation support service software?

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At its essence, litigation support service software supports the exchange of legal documents between lawyers and the courts.



But it can also be much more than that. It can provide features and functions legal support service providers need to run a successful business: Order and document management, automated document preparation, customer and vendor communication tools, billing, reporting, and more.

### Why do you need it?

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#### **To stay relevant.**

The technology revolution in the courts is well on its way. E-filing is becoming the norm.

Some states are (or will be soon) requiring process servers to upload GPS and photos.

#### **To stay competitive.**

More and more, law firms are demanding technology capabilities from their providers.

#### **To grow.**

Having the right litigation support service software is key to not just staying in business, but to growing.

## How to know if you're ready to purchase

You're reading this guide, which is one sign that you're looking for a solution! You may also be experiencing some of the following:

- Business growth stalled
- Spending too much time on manual tasks
- Overwhelmed with multiple systems and processes
- Losing out to competition
- Current system is not responsive to your needs (poor customer service, infrequent updates)

You may have been experiencing these problems for some time now. We advise acting sooner than later. These are warning signs that could lead to bigger problems later. Taking the leap to purchasing a system or switching to a new one takes an investment of time and money, and it's a risk. But as LegalConnect founder David S. Nill said, "The only thing scarier than changing is not changing."

## Types of software

Not all litigation support service software is the same. You'll want to find one that matches your business model or the model you want to expand into.



### Process serving

You'll find a lot of options for process serving software. These systems will support functions like order management, billing, payment, client communication, vendor network, and proof generation.



### All in one

These systems support process serving and e-filing and possibly other services like physical filing, records retrieval, and investigations.



### White label vs. custom

Some systems are "white label," which means they offer a set of capabilities with minimal room for customization. Custom systems are built from the ground up to your specifications. White label systems will be much more affordable than custom systems, but they may not do everything you want in the way you want.

# What features to look for in litigation support service software

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## Must-haves

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These are the foundational features of any good litigation support service system.

### Customer portal

The customer portal is a way for your customers to access the system themselves and place orders.

The customer portal should:

- Allow customers to search by case
- Include an easy way to create an account
- Deliver conformed copies and proofs of service to their accounts
- Provide order status updates in real-time
- Be equipped with error and informational alerts to help ensure documents are complete and correctly formatted

### Operations portal

The operations portal is a way for you and your staff to get on the system to manage orders.

The operations portal should:

- Let you view and manage e-filing orders
- Let you view and manage process serving orders
- Let you communicate with servers to provide updates and sign proofs
- Allow you to deliver concierge service to your clients.
- Display order deadline countdown (for example, tomorrow, today, in 2 hours, overdue)
- Provide you with a customer account view

### Vendor portal

The vendor portal is a way for vendors (like other process servers, court filers, etc.) to get on the system and receive orders, update statuses, and submit invoices.

### Payment processor

A payment processor allows you to accept payments from clients online. The system should use a best-in-class processor, like Stripe.

### Verified security

- The system should be certified by a third party like SOC 2 or PCI.
- All web traffic should be encrypted with 2048-bit RSA TLS/SSL.

### Geographical service area

The e-filing software must be certified in the courts you serve. (And in the states you may expand to in the future.)

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### Good-to-haves

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Accounting software integration	A system that works with QuickBooks Online or other software.
Easy customer account set up	Your customers should be able to sign up for an account without needing your help.
Analytics and reporting	Your system should generate meaningful reports and analytics that help optimize processes and demonstrate value to clients.
Customizable proofs of service	Make changes to proofs or affidavits.
Law firm software compatibility	The software should integrate with practice management and document management tools law firms commonly use.
API capability	<ul style="list-style-type: none"> <li>• The software should offer an application programming interface (API) to tailor system-to-system integrations with law firms or with your own system.</li> <li>• APIs can be necessary for high-volume orders.</li> </ul>
Affiliate network	Find other vendors to either hire or be hired by.

## Cost and value

While cost shouldn't be your only consideration, it's an important factor. Find the best system you can afford, thinking ahead to the potential for cost savings and revenue increases.

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### Payment models

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Litigation support service software generally falls into one of three payment models:

#### **Subscription**

These systems charge a base monthly fee, then additional fees based on the number of orders.

#### **Per order**

Some systems charge a flat fee based on the number of orders placed.

#### **Upfront**

These systems charge a one-time upfront fee.

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### Extra charges

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Make sure you're clear on what's included in the costs. Some companies charge extra for things like: customizations, customer support, and APIs.

#### Questions to ask:

What is included in the cost? What is not?

## Customer support

Especially if you're new to litigation support service software, make sure the customer support is strong. You'll be working closely with their support team as you learn the software, and you want them to be responsive in urgent situations.

Look for customer support that has these features:

- In-house
- Knowledgeable about the software AND the industry
- Available when you need them
- Responsive
- Conducted over multiple modes: phone, text, chat, email
- Uses a ticketing system for faster response

### Other things to look for:

- Initial training should be live and one-on-one
- Robust online knowledge base
- Training videos
- Testimonials and case studies that speak to the customer support

### Questions to ask:

Is support included in the price or is it an additional fee?

## Testing

After you've narrowed down your choices to two or three, it's time to test the systems. Getting onboard with a new system takes a lot of resources. You want to be as sure as possible you've made the right decision.

- Ask for a demo.
- Try a free trial, if one is available.

## Implementation

After signing up for a system comes implementation. This is where you and your staff will learn to use the system and where you'll set up any necessary related systems. Being thorough during this important phase will pay off down the line.



### **Set aside time.**

Be prepared to devote a good amount of time to the transition. Setting up your account and learning the software take time, and you want to get up to speed as soon as possible.



### **Decide on a strategy.**

Move clients over in phases or all at once. Your new software provider should have a wealth of experience and be able to advise you.



### **Communicate early and often.**

Prepare your customers and staff for the transition. Your new software provider may even have communication templates you can use or be willing to conduct trainings.

### Questions to ask:

- How are new clients onboarded?
- How long does it take before I can begin using the system?

## How to tell if it's working

You've picked a system and been onboarded. Now what? Hopefully, after the dust has settled, you'll start to see positive signs...the opposite of the warning signs you were seeing at the start of this journey.

It won't happen overnight, but within six months to a year, you should see:

- Higher client satisfaction
- Increased productivity
- More time for high-value tasks
- Healthier cash flow
- Revenue increase

These are the signs that your litigation support service software is doing what it should. If you don't see improvements, work with your provider to make adjustments.

## Ready for what's next

As the world—and the legal industry along with it—turns ever more digital, having litigation support service software you can rely on becomes increasingly important. Reading this guide is a great first step on your digital transformation journey!

If you have more questions or you'd like to learn how LegalConnect can help you manage and grow your business, contact us today.

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## Resources

[Legal Support Service Software Scorecard](#)

[Legal Support Service Software Data Security Checklist](#)



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