



LegalPat

Tech Based Consulting

LegalPat Migration Toolkit

Guiding Law Firms from Legacy Systems to Leading-Edge Solutions

Welcome to the Toolkit

At LegalPat, we believe that the right software isn't just a tool—it's a turning point. Whether your firm is ready to modernize from outdated systems or build workflows that support long-term growth, this toolkit is your strategic starting point.

Curated by Patrice Gimenez, a trusted advisor in legal technology consulting, this collection of planning tools and insights empowers law firm leaders to migrate confidently, evaluate wisely, and build resilient, future-proof operations.

What's Inside

✓ Migration Readiness Worksheet

Assess your firm's technical, operational, and cultural readiness for software transition.

✓ Platform Evaluation Scorecard

Compare leading platforms—Clio, Filevine, Smart Advocate, Rocket Matter—against your firm's priorities.

✓ Top Questions to Ask Your Vendor

Lead smarter demos and discussions with a strategic checklist covering migration, compliance, scalability, and support.

How to Use This Toolkit

Print it, share it, and use it in meetings, demos, and planning sessions. Whether preparing for a software transition or advising others through one, this toolkit is designed to help you lead with clarity and confidence.

About Patrice Gimenez

Founder of LegalPat LLC, Patrice brings over 40 years of experience bridging law and technology with clarity, compassion, and strategy. Her dedication to client success has helped countless firms reimagine how technology supports their missions.

A former Chief Operating Officer in the legal software space, Patrice is widely known for her integrity, technical fluency, and ability to transform uncertainty into smart action.

“Success isn't just about numbers—it's about the relationships we build and the lives we impact.”

Testimonial

“You’d be foolish not to get a consultant fluent in analysis and integration before making a decision. You can’t trust the software vendor alone—Patrice should be the number one person on your list.”

— Brian Labovick, Labovick Law Group

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Migration Readiness Worksheet

Assess your firm's preparedness for a successful software transition.

This worksheet helps law firms evaluate their readiness to migrate from legacy systems to modern legal software. Score each category from 1 (Not Ready) to 5 (Fully Ready). Use the notes column to document concerns, blockers, or follow-up items.

Category	Score 1-5	Notes
Data Quality & Organization		
Staff Readiness & Training		
Workflow Documentation		
Current System Limitation		
IT Support & Infrastructure		
Executive Buy-in		
Budget & Timeline Clarity		
Vendor Research Progress		
Migration Partner Identified		
Contingency Planning		

Scoring Guide:

40–50: You're ready to move forward with confidence • 30–39: You're close—address a few key gaps

Below 30: Consider pausing to strengthen your foundation



Platform Evaluation Scorecard

How to Use This Scorecard

This scorecard allows your team to assess and compare legal case management platforms based on essential features. Score each platform from 1 (Does Not Meet Needs) to 5 (Fully Meets Needs) and take notes during demos or vendor calls for key insights.

Category	Clio	Filevine	Smart Advocate	Notes
Case Intake & Custom Fields				
Doc Mgmt & Templates				
Time & Billing				
Workflow Automation				
Email & Calendar Integration				
Reporting & Dashboards				
Client Portal & Communication				
Mobile Access				
API/Integration Capability				
Migration Support & Service				
Customer Support & Training				
Pricing Transparency				



Evaluation Prompts

Discussion Prompts for Your Team

- Which platform aligns best with our current workflows?
- Which vendor demonstrated the strongest understanding of our needs?
- Are there any deal-breakers or missing features?
- What are the long-term costs or limitations?

Final Notes

Next Steps

Use this scorecard to guide internal discussions and shortlist platforms. If you'd like help interpreting results or planning a phased rollout, LegalPat offers vendor-neutral consulting to support your decision-making process.



Top Questions to Ask Your Vendor

Lead Smarter Demos. Avoid Hidden Costs. Choose the Right Partner

Why These Questions Matter

Choosing legal software isn't just about features—it's about finding a platform and partner that aligns with your firm's workflows, compliance needs, and long-term goals. Use this checklist during demos, RFPs, or vendor meetings to uncover capabilities, risks, and hidden costs before you commit.

Data Migration

Question	Notes
What formats does your platform accept for data migration?	
Do you assist with field mapping and cleanup?	
How do you handle legacy field logic and non-standard formats?	
Is there a test environment to validate migrated data before go-live?	

Security & Compliance

Question	Notes
Is the platform SOC 2, HIPAA, or ISO 27001 compliant?	
How is client data encrypted in transit and at rest?	
Can we control user access based on role or practice area?	



Integrations & Workflow Flexibility

Question	Notes
Can the system integrate with our existing tools (Outlook, Google, eSignature, etc.)?	
Do you support custom automation or workflow logic?	
What's the API access level for developers or consultants?	

Training & Support

Question	Notes
Is onboarding personalized for our firm's structure?	
Are live training sessions included, or is support ticket-based only?	
Do you offer ongoing admin or user support post-implementation?	

Cost & Scalability

Question	Notes
What fees apply beyond the base subscription (storage, support, add-ons)?	
How do costs scale with firm growth or added users?	
Are updates or new features included in the pricing?	

Pro Tip:

Don't just ask these questions – ask for examples. A great vendor will be transparent, specific, and eager to show how they've solved similar challenges for other firms.

