



## Law Firm Tech Stack Checklist

This checklist outlines the core components required for a functional, secure, and compliant law firm technology launch. It includes non-negotiable infrastructure, essential tools for billing and document management, and optional enhancements that can be phased in over time. Each item is tied to real operational risk—missing pieces will directly impact attorney productivity, cash flow, data security, or client service. Use this as a deployment guide and prioritization tool to avoid costly gaps and delays.

### ESSENTIALS

- ☐ Microsoft 365 Tenant Setup (Entra + MFA)
- ☐ CyberSecurity Protection (IDS, SIEM)
- ☐ Exchange Online Email Setup & Security
- ☐ Microsoft Teams (Messaging + Meetings)
- ☐ Intune + Autopilot Device Management
- ☐ OneDrive + Folder Redirection
- ☐ Help Desk & Tech Support
- ☐ Encrypted Laptops or Virtual PCs (VPCs)
- ☐ Microsoft Office 365 Suite
- ☐ Adobe Acrobat Pro + eSign
- ☐ Litera One (formerly Compare)
- ☐ Legal Research Tools (e.g., Westlaw, Practical Law)
- ☐ Aderant Expert Sierra (Accounting + Billing)
- ☐ Aderant Expert Sierra (Conflicts + Intake)
- ☐ Milana Docketing (if needed for Litigation)
- ☐ Payroll & Benefits

### BILLING OPTIMIZATION

- ☐ iTimekeep (Time Capture)
- ☐ BillBlast (eBilling Submission)
- ☐ ONYX AI (OCG Compliance)
- ☐ Paperless Prebill Review Workflow

### DOCUMENT MANAGEMENT

- ☐ Document Management System (e.g., iManage, NetDocs, or Sharepoint)
- ☐ AI-Powered Document Drafting

### ADDITIONAL IMPROVEMENTS

- ☐ Expense Management
- ☐ EDiscovery
- ☐ Zoom
- ☐ Docusign
- ☐ Additional Subscriptions (Law.com, etc.)
- ☐ Computer Peripherals
- ☐ CLE Management & Training
- ☐ Knowledge Management
- ☐ Human Capital Management

Every item on this list serves a critical function, none are arbitrary, and deferring the wrong pieces can stall revenue, increase risk, or frustrate attorneys. If budget constraints require trade-offs, make them with full awareness of the operational consequences. This checklist isn't aspirational. It's the minimum standard for a firm that intends to function professionally from day one.

### Federate Legal Inc.

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