

CLICKOAI LAW FIRM GUIDE 20 OF 63

Switching Legal Software Checklist

Requirements, migration, training and exit in one place.

Use it when	the firm is replacing practice, document, CRM or workflow software
Boundary	This is vendor-neutral and does not approve a supplier, contract or migration plan.

Built for independent law firms in England and Wales

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1. Frame the decision

Treat implementation as operating change, not data copying. Records, controls and continuity must survive the move.

Specific focus

Protect records and critical work while moving systems.

Questions to answer

- For this guide: Protect records and critical work while moving systems.
- Which problem must change?
- What records must move?
- Which reports depend on the old system?
- What is rollback?

Avoid

- migrating everything
- letting supplier define success
- cutting over before reconciliation

2. Control sheet

Treat a blank evidence field as a reason to pause, not a reason to guess. Record sources and owners before changing the workflow.

Area	Evidence to collect	Pass condition
Requirements	Needs and constraints	Brief is signed
Data	Inventory and mapping	Sample reconciles
Controls	Roles and permissions	Owner approves
Adoption	Training and support	Critical routes work
Cutover	Freeze and rollback	Go decision has evidence

Fail closed

If an input, owner or approval is missing, record the gap and keep the affected step outside the proposed change.

3. Working record

Complete this page with counts, dates and named sources. Do not include client names, matter names, contract text or privileged material.

Field	Evidence or answer
Guide focus	Protect records and critical work while moving systems.
Change owner	
Critical workflows	
Data inventory	
Reconciliation sample	
Rollback deadline	
Exit evidence	

Evidence quality check

- The source is named and dated.
- An estimate is labelled as an estimate.
- The owner can reproduce the measure.
- The same method can be used after a change.

4. Decision record

Select the outcome that the evidence supports. A stop or no-change decision is valid.

- Stop: a required source, owner or approval is missing.
- Fix: repair the underlying route before adding technology or cost.
- Test: run one bounded change with a baseline and review date.
- Proceed: adopt only the option supported by the recorded evidence.

Decision field	Record
Chosen outcome	
Reason and evidence	
Owner and approvers	
Review or expiry date	

Primary sources

[Law Society: Buying new technology](#)

[ICO: Information security checklist](#)

[NCSC: Choosing a cloud provider](#)

[NCSC: Cloud shared responsibility](#)

Source status

Links checked 18 August 2026. Confirm the current version and obtain appropriate professional advice before relying on regulated, contractual, privacy, security, insurance, financial or wellbeing conclusions.