

**Case, Matter, & Practice Management System  
Software Web Site**

*Sample CMS Reference Questions & Checklist*

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**Person Completing Checklist:**

**Date:**

|               |          |
|---------------|----------|
| Product Name: | Company: |
|---------------|----------|

**Reference Information**

|          |        |
|----------|--------|
| Firm:    |        |
| Contact: |        |
| Phone:   | email: |

**Reference Computing Environment**

|   |                        |                 |
|---|------------------------|-----------------|
| Firm Size: Small - Medium - Large               | # Offices:             | # Users:        |
| Type Practice: Private          Corporate Law   | Government Law         | Other           |
| Local Area Network:    Novell Netware (version) | Windows NT (version)   | Other (version) |
| Workstations: PC          Macintosh             | Wide Area Network? Y/N |                 |

**Reference Installation History**

|  |
|--|
| How long system in use?                |
| How was the system phased in?          |
| How long was the firm "down?"          |
| How long to implement the full system? |
| Who did the installation?              |
| Was IT trained prior to installation?  |

**Company Training & Support**

|   |                              |          |             |
|---|------------------------------|----------|-------------|
| Training Requirements?  |                              |          |             |
| How was the training?   | Poor                         | Adequate | Exceptional |
| Did everyone receive training?                                      | Training Materials Provided? |          |             |
| What is the average response time from vendor to correct a problem? |                              |          |             |
| How is the support?   | Poor                         | Adequate | Exceptional |

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**General**

|   |
|---|
| Overall Comments?                             |
| Any technical or compatibility issues?        |
| Any management issues?                        |
| Any stumbling blocks?                         |
| Is the system a good fit for the firm?        |
| How have the users adapted to the new system? |
| Would you recommend the company?              |
| Notes:  |
|   |
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|   |