Enterprise Legal Management Software: A Buyer's Checklist

What an ELM system should do for a legal team

Enterprise legal management software, also called ELM, is the set of tools a legal department uses to run its own work: the requests that come in, the matters it opens, the outside counsel it pays and the reports it owes the business. Ask each vendor which of those areas it runs in one product and which it connects to another tool.

Use these questions with every ELM vendor you talk to, in nine areas, from intake to pricing. Ask for each answer in writing, with the page or clause that states it. Under each area, one line says how LegalOperator answers. Hold us to the same standard.

Written by Craig Raeburn, co-founder of LegalOperator, who has been in legal technology since 1991.

---

1. Intake: how legal requests come in

- ☐ Where can employees ask, and does it take a form?
- ☐ How is a request routed?
- ☐ Is a lawyer's answer reused?
- ☐ Where do answers come from, and what happens when the system is unsure?
- ☐ Can a request become a matter without retyping?

> **LegalOperator:** Employees ask in the tools they already use, and a tracked request is created with no form.
>
> See Intake: legaloperator.ai/legal-front-door. Intake tools side by side: legaloperator.ai/compare.

2. Matters: how work is tracked

- ☐ What does a matter hold?
- ☐ How does status stay current, and who signs it off?
- ☐ What does a budget do?
- ☐ Does it connect to the tools you already use?
- ☐ Who can see a matter?
- ☐ Does a matter have a timeline?
- ☐ How does a matter end?

> **LegalOperator:** Each matter holds its owners, documents, budget and timeline, and a Matter Lead locks the status updates.
>
> See Matters: legaloperator.ai/matters.

3. Documents: review, drafting and search

- ☐ How are contracts reviewed?
- ☐ Can standard documents be generated?
- ☐ Which knowledge sources connect?
- ☐ What does the lawyer receive?
- ☐ Can you search past matters and documents?
- ☐ What does it not do?

> **LegalOperator:** Contracts are checked against your playbook, and past documents are searchable in plain language.
>
> See Documents: legaloperator.ai/document-review, and Matter Research: legaloperator.ai/matter-research.

4. E-billing: invoices from outside counsel

- ☐ Which invoice formats are accepted, and how do firms submit?
- ☐ What is checked on each line, and who decides?
- ☐ What leaves the system?
- ☐ Do law firms pay a fee to submit invoices?
- ☐ How does each line get a UTBMS code?
- ☐ How are accruals handled?
- ☐ Can you compare firms?

> **LegalOperator:** Every line is checked against your guidelines, and a person on your team approves, holds or returns each invoice.
>
> See E-billing: legaloperator.ai/legal-spend. Vendors in their own words: legaloperator.ai/compare/ebilling.

5. Reporting: what leadership sees

- ☐ What does spend reporting show?
- ☐ Where does every matter stand?
- ☐ What does the General Counsel or CFO receive?
- ☐ Can the team ask questions in plain words, from the tools it already uses?

> **LegalOperator:** Spend by matter and firm, and the Legal Ops Scorecard, answered in plain words by Iris.
>
> See Iris: legaloperator.ai/iris.

6. Integrations: what connects, and what it costs

- ☐ Which integrations are included, and which are custom?
- ☐ What does a maintenance fee cover, and what does it cost each year?
- ☐ Can it connect to other legal tech systems: CLM, IP, document management?
- ☐ Is a custom build a one-time fee or ongoing?
- ☐ Which systems does it connect to today?
- ☐ Who maintains an integration when a system changes?

> **LegalOperator:**
>
> **Communications:** Slack, Microsoft Teams, Zoom Chat, and email from Outlook or Gmail.
>
> **Knowledge base:** Notion, SharePoint, OneDrive, Google Drive and Box.
>
> **Workflow and data:** Jira, TeamConnect, Onit Unity and CounselLink, all two-way, and the MCP Connector for Claude and ChatGPT.
>
> Setup covers standard integrations, and a custom integration is scoped with you first.
>
> See Integrations: legaloperator.ai/integrations.

7. Security: what to ask for

- ☐ What independent audit or test exists, and what is its date?
- ☐ How is data encrypted?
- ☐ Is customer data used to train AI models?
- ☐ Is single sign on or 2FA available?

> **LegalOperator:** The answers are on Trust and security: legaloperator.ai/trust.

8. Contract terms

Read the contract itself. A product page and this page are not the contract. Ask every vendor:

- ☐ Can you cancel when you want, and what does it cost?
- ☐ Which fees does the contract name: implementation, integrations, support?
- ☐ Can the price change without your written agreement?
- ☐ What happens to your data when the contract ends?

> **LegalOperator:** No lock-in. No automatic price increases.

9. Pricing transparency

- ☐ Is the price published?
- ☐ Who needs a seat?
- ☐ What does setup cover, and what does it leave out?
- ☐ Which numbers set the price?
- ☐ What is one-time and what is monthly?
- ☐ What does the plan include?

> **LegalOperator:** The plans and the numbers that size them are on the pricing page: legaloperator.ai/pricing.

See how LegalOperator answers these.

A demo walks through each area with sample data. Book a demo at legaloperator.ai, or write to hello@legaloperator.ai.