

The Legal Software Evaluation Scorecard

Score each criterion 1 to 5 during the demo, while it is fresh. Set your weights before you shop, not after: a solo and a 600-case firm should weight these differently.

Criterion	Weight (H / M / L)	Score (1–5)	Notes from the demo
1. Built for this work Does the workflow speak SSD natively (hearing levels, CE exams, OTR requests), or do you rename "matters" and build it yourself? Who else in disability law uses it?			
2. Plays well with your stack Direct integration vs. middleware vs. nothing, in that order. Open API vs. closed. "Integration" on the roadmap is not integration: score what exists today.			
3. Your staff will actually use it Time-to-first-value: what can a paralegal do after one hour? Who does the training, the vendor or you? Will it survive your actual team, including remote staff?			
4. The vendor will still be around Shipping velocity, trajectory of the customer base, roadmap honesty, and security posture as a durability proxy.			

Tie-breaker: two tools tied on total? The one with the higher staff adoption score wins. Every time. Cost is deliberately not a fifth row: price only means something relative to these four. The money questions are below.

► The five questions to ask in any demo

- "Is that live today, or on the roadmap?"** Ask it about every feature that matters to you. If it is not live, it does not exist yet.
- "Show me this working on a disability case."** Hearing levels, CE exams, SSA deadlines. Your workflow, not a generic matter.
- "What is my total first-year cost, in writing?"** Implementation, training, add-ons, and what the price becomes at renewal.
- "What can my paralegal do after one hour?"** Then ask who runs the training: them, or you.
- "What does your SSD forms library look like, and can I take it with me?"** Purpose-built software ships CE exam, OTR, and hearing templates. A generic tool does not, and may not let you export your own either.

The question bank, certifications decoder, and red flags

► The extended question bank

1. Built for this work

- Show me a disability case in your system. Are hearing levels, CE exams, and OTR requests native, or do I configure them myself?
- Which SSD firms use this today? Give me names I would recognize.
- How much configuration does a firm my size typically need before this is useful, and who does that work?

2. Plays well with your stack

- Which of your integrations with my current tools are live today, direct, and not through Zapier?
- Is your API open? Can I export my data, and can other tools connect to it?
- Can I talk to a firm that uses this exact integration right now?

3. Your staff will actually use it

- What can my paralegal do after one hour in the product?
- Who runs training, you or me? Is onboarding a product or a PDF?
- How does this work for remote or overseas staff?
- For references: "If this tool disappeared tomorrow, how would your staff react?"

4. The vendor will still be around

- What did you release in the last 90 days, and what customer feedback shaped it?
- Is your customer base in disability law growing?
- What have you said "no" or "not yet" to on the roadmap?
- Which security certifications do you hold, and can I see the report?

If the product says "AI" on the label

- Point to the click: where exactly in my workflow does the AI do something? Show me the moment.
- What happens when it is wrong? Real AI products build in a verification workflow, because their builders know the failure modes.
- What would I lose if you turned the AI off? If the honest answer is "nothing," you are paying AI prices for the label.

► Certifications, decoded

SOC 2: An independent auditor checked the vendor's security controls. Type I means the controls existed on audit day. Type II means they actually operated over months. Ask for Type II, and ask to see the report.

The honest decoder: Certifications do not mean the product is good. They mean the company submitted to outside scrutiny and invested in staying around. No certification plus vague security answers on medical data is a walk-away, not a discount.

One line to ask: "Can you share your SOC 2 Type II report and your data-handling summary?" Then watch whether the answer is a document or a story.

► Red flags: walk away

- 1 **"It's basically ready."** Roadmap answers to current-state questions. If it is not live, it does not exist.
- 2 **Pricing you can't get in writing.** If the price needs a phone call, the price is negotiable. Which means someone else paid less.
- 3 **No references in disability law.** "Law firms love us" is not "SSD firms use us."
- 4 **Your data, their hostage.** No export path, closed API, or vague answers about leaving.
- 5 **The demo never touches your workflow.** If they will not demo your use case, the polish is the product.

Want a second set of eyes? Book a free software strategy session: bring your current stack or a decision you are weighing, and we will walk through the framework as it applies to your firm. chroniclelegal.com/demo