

Law Kit Outline by Akeem Oluwasegun

- Prepare for: Legal Pros
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Lawyer Protection Toolkit: Before You Sign Any Legal Tech Contract

(For Filevine, Clio, PracticePanther, or any CRM/vendor)

1. Verify the Seller's Identity

- ✓ Check the sender's email:
 - Official email = e.g [@filevine.com](#) [@clio](#) [@practicepanther](#)
 - Suspicious = Gmail, Yahoo, or unknown domains.
 - ✓ Verify the **contracting entity**:
 - Example: **Filevine, Inc.** (Salt Lake City, Utah)
 - If you come across a different LLC name, contact Legal CRM Corporate to verify its legitimacy.
 - ✓ Ask for **proof they're authorized**:
 - "Please confirm that you are an official employee or certified partner of the Legal CRM company you represent."
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2. Watch for These Red Flags

- 🚫 **3-year lock-in** with no trial period.
 - 🚫 **Price changes based on your firm's size or revenue** (predatory pricing).
 - 🚫 **Auto-renewal with 30-day cancellation** — too short to act.
 - 🚫 **No performance clause** — no way out if promises aren't met.
 - 🚫 **Payment to a third party** instead of the software company.
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3. Negotiate These Terms

- 👉 **Shorter Initial Term:** 12 months max (or 6-month pilot).
 - 👉 **Performance Exit:** Cancel if onboarding, migration, or promised features aren't delivered within 30–90 days.
 - 👉 **Price Cap:** Limit annual increases to 3–5%.
 - 👉 **Clear Deliverables:** List exactly what's included — migrations, templates, training, integrations.
 - 👉 **No Hidden Integrations:** Get upfront costs for any third-party tools.
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4. Ask These Questions Before Signing

1. What's the total cost for the full term? (All fees included)
 2. Is there a setup fee? If yes, what does it cover?
 3. Can I cancel early without paying the remainder?
 4. Who will handle onboarding — your team or a contractor?
 5. What's your support for SLA? (Response time for tickets)
 6. Will I need to buy extra tools to get promised features?
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5. Sample Vendor Verification Email

Subject: Vendor Verification Before Contract Signing

Dear [Vendor Name],

Before proceeding, please confirm:

1. Your full legal name and contracting entity.
2. Whether you are an employee of Filevine, Inc. or an authorized partner.
3. A copy of your official partner/employee ID or listing on Filevine's partner directory.
4. Whether the attached proposal matches Filevine's standard terms and pricing.

This will help us ensure proper compliance and protect all parties.
Thank you,
[Your Name / Firm]

6. Final Rule

- 📌 **Never sign under time pressure** — if they push “sign now or lose the deal,” walk away.
- 📌 Always get a second opinion — ideally from someone like a legal tech consultant, not just another lawyer.