

<div>PROBLEM</div> <div>List the three main issues you want to solve.</div> <div>1.</div> <div>2.</div> <div>3.</div> <div>Could any existing tools solve this problem?</div> <div>What do those tools lack?</div> <div>What are the non-goals? What are you NOT trying to do?</div>	<div>CONCERNS</div> <div>Consider the tool’s security, the nature of its data, and its storage/ownership.</div> <div>Where will this be used?</div> <div>On what devices?</div> <div>How is the data protected?</div> <div>→ COMPARED TO WHAT?</div> <div>*Does the status quo pose the same concerns?</div>	<div>ETHICS</div> <div>Consider the ethical implications of using the tool.</div> <div>Are any disclosures needed?</div> <div>Who owns/makes the tool?</div> <div>Is it consistent with the firm’s mission and values?</div> <div>Does its use create an attorney client relationship?</div> <div>Could there be unintended consequences?</div>	<div>SOLUTION</div> <div>Describe the new tool and the top three features.</div> <div>1.</div> <div>2.</div> <div>3.</div> <div>Describe <u>integration</u> and new workflow.</div>
<div>USER(S)</div> <div>List all the people involved in the process (clients, attorneys, staff...).</div> <div>Consider user turnover, ease of adoption, and users’ willingness to adopt.</div>	<div><input checked="" type="checkbox"/> CONSIDER THE IMPLICATIONS OF...?</div> <div><input type="checkbox"/> <a href="#">Rules of Professional Conduct</a></div> <div><input type="checkbox"/> <a href="#">Computer Fraud Abuse Act</a></div> <div><input type="checkbox"/> <a href="#">HIPAA</a></div> <div><input type="checkbox"/> <a href="#">Court Rules</a></div> <div><input type="checkbox"/> Virtual desktop/remote work</div> <div><input type="checkbox"/> Add applicable laws or considerations specific to your situation.</div>		<div>ALTERNATIVES</div> <div>List the other solutions considered (including analog solutions).</div> <div>List any of the proposed tool’s competitors.</div>
<div><div>STATUS QUO</div><div>TIME</div><div>NEW PROCESS</div></div> <div>Perform a <u>balancing test</u> to weigh the time and cost of maintaining the status quo, with the time and cost of implementing the new process.</div> <div>Consider: (1) how <b>often</b> you complete this task;</div> <div>(2) the hourly rate of each individual involved in the process and the ultimate cost of the <b>status quo</b>;</div> <div>(3) the cost and availability of <b>training</b>;</div> <div>(4) the tool’s upfront and maintenance <b>costs</b>;</div> <div>(5) the cost of any <b>new infrastructure</b> needed to support tool; and</div> <div>(6) the potential time and cost <b>saved</b> by implementing the new process.</div> <div>TRAINING</div>			

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