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| --- | --- | --- | --- |
| **PROBLEM**  List the three main issues you want to solve.  1.  2.  3.  *Could any existing tools solve this problem?*  *What do those tools lack?*  *What are the non-goals? What are you NOT trying to do?*  **USER(S)**  List all the people involved in the process (clients, attorneys, staff…).  Consider user turnover, ease of adoption, and users’ willingness to adopt. | **CONCERNS**  Consider the tool’s security, the nature of its data, and its storage/ownership.  *Where will this be used?*  *On what devices?*  *How is the data protected?*  *🡪 COMPARED TO WHAT?*  *\*Does the status quo pose the same concerns?* | **ETHICS**  Consider the ethical implications of using the tool.  *Are any disclosures needed?*  *Who owns/makes the tool?*  *Is it consistent with the firm’s mission and values?*  *Does its use create an attorney client relationship?*  *Could there be unintended consequences?* | **SOLUTION**  Describe the new tool and the top three features.  1.  2.  3.  Describe integration and new workflow.  **ALTERNATIVES**  List the other solutions considered (including analog solutions).  List any of the proposed tool’s competitors. |
| HD Black Checkmark Box Icon PNG | Citypng **CONSIDER THE IMPLICATIONS OF…?**  [Rules of Professional Conduct](https://www.mass.gov/guides/massachusetts-rules-of-professional-conduct)  [Computer Fraud Abuse Act](https://www.law.cornell.edu/uscode/text/18/1030)  [HIPAA](https://www.cdc.gov/phlp/publications/topic/hipaa.html#:~:text=The%20Health%20Insurance%20Portability%20and,the%20patient's%20consent%20or%20knowledge.)  [Court Rules](https://www.mass.gov/guides/massachusetts-rules-of-court-and-standing-orders)  Virtual desktop/remote work  *Add applicable laws or considerations*  *specific to your situation.* | |
| **STATUS QUO**  **TIME** **NEW PROCESS**    Perform a balancing test to weigh the time and cost of maintaining the status quo, with the time and cost of implementing the new process.  Consider: (1) how **often** you complete this task;  (2) the hourly rate of each individual involved in the process and the ultimate cost of the **status quo**;  (3) the cost and availability of **training**;  (4) the tool’s upfront and maintenance **costs**;  (5) the cost of any **new infrastructure** needed to support tool; and  (6) the potential time and cost **saved** by implementing the new process.  **TRAINING** | | | |
| **PROBLEM**  **USER(S)** | **CONCERNS** | **ETHICS** | **SOLUTION**  **ALTERNATIVES** |
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| **STATUS QUO**  **TIME** **NEW PROCESS**    **TRAINING** | | | |