



HOW TO MAKE THE CASE FOR

New Technology at Your Firm

Your step-by-step guide to asking for new tech, and
getting the answer you want

Steno

In this guide, you'll learn how to get the tech you need using terms your firm can't ignore: efficiency, profit, and growth.

As everyone who works in a law firm knows, a paralegal's job is never done. Tracking case deadlines, managing documents, speaking with clients, conducting research—all while posting billable hours—is a challenge for even the most efficient professionals.

"Using technology is probably the best way to maximize your efficiency," said Kaitlyn Story, a senior litigation paralegal and a litigation support trainer at Covalent Legal Services, appearing on Steno's *Between the Briefs* podcast. "There's a lot of room to maximize the efficiency of your team and be able to help even more clients."

Of course, new systems cost money and require buy-in, and that means convincing partners to invest both money and time. At a firm busy with cases and clients, that is rarely an easy task. But it's also not impossible.

Paralegals who are willing to do research, build a business case, make a presentation to firm leadership and take charge of implementation can influence technology decisions—especially if those decisions can be linked directly to efficiency, time savings and billable hours.

This playbook will guide you through the process of proposing new technology at your firm, from initial planning to pitching your idea, including:

- **How to compare and select vendors**
- **A comprehensive research matrix**
- **How to present your business case**
- **Turning objections into opportunities**

This isn't just about adopting new tools; it's about positioning yourself as an indispensable asset to your firm. Whether you're tackling document management, time tracking, or client communication, this guide equips you with the strategies to achieve the buy-in you want for the tech you need.

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PODCAST

BETWEEN *the* BRIEFS

WITH **STENO**

Don't miss Kaitlyn Story's incredible episode on Steno's Between the Briefs podcast where she dives into technology and AI tools that can help paralegals maximize output and efficiency.



"Using technology is probably the best way to maximize your efficiency."

-- Kaitlyn Story | Senior Litigation Paralegal

1. What It Takes

Pitching a technology upgrade can be successful if you build a solid business case and clearly highlight the benefits of this investment. Before you dive into demos, trials and research, consider these points and plan your project.

- **Be Completely Transparent.** Before you begin, make sure leadership knows what you're doing and is willing to hear a presentation. If possible, try to find a supporter in their ranks who is willing to champion new technology.
- **Document Your Firm's Needs.** Don't go shopping without a list. Before you contact vendors, document the needs in your office for lawyers, paralegals and other support personnel. Is it time savings, digital organization, online collaboration—or maybe all of the above? Collect some input and put it in writing.
- **Examine Multiple Options or Vendors.** Your needs document will give you a checklist as you begin to take demos—and you should always take more than one. A full understanding of products in the marketplace will enhance your knowledge and credibility.
- **Understand Costs Completely.** Make sure you understand setup fees, first- and second-year costs, add-ons and how and whether you can exit a contract. You are going to get questions. Be sure you can answer them.

- **Present Tangible ROI.** When you make your presentation to the firm's leadership, try to quantify and illustrate the return on investment. How many hours will the technology save each week? How much revenue will it produce? Have numbers, examples and visual aids.
- **Set Expectations About Implementation.** If multiple people will use the new system, make sure they understand that they must buy in and that there is a learning curve. No technology is effective if people can't or won't use it. Have a plan to get everyone trained and fluent.
- **Don't Forget Support.** Understand how much technical support and training is included in your price, whether that will be sufficient and what it costs to buy more. Know the procedure, who to call and what to expect if you encounter a technical problem.
- **Maintain Some Perspective.** Pitching a cost increase is seldom easy, and leadership may sometimes decline. But with a professional presentation, they will see you as someone who is working to improve operations—and they will appreciate it.

"You have to market it!"

-- Kaitlyn Story | Senior Litigation Paralegal

2. How to Build Your Case

Pitching new technology means building a business case for the investment, explaining why and how a new system will save time, save money, grow efficiency, eliminate bottlenecks, increase revenue and otherwise improve how the firm conducts its business.

Getting Started

It is your job to collect information, build the case, and present it to the lawyers in your firm in a way that they will understand.

As Story put it, "you have to kind of market it." That marketing begins with a conversation with leadership to ensure they are on board. You want them to know that you are looking at a technology solution and that you will be bringing information back to the firm about features, costs and options.

It may also be worth consulting with whomever handles your IT work, just to make sure you are aware of any considerations or limitations that may apply to new systems. With those blessings, you can get to work.

Action Items

- ☑ Use a spreadsheet to track your research, including features, costs, and potential ROI for each option.
- ☑ Create a simple questionnaire for colleagues to gather pain points and technology needs.
- ☑ Develop a one-page executive summary of your proposal for quick reference.
- ☑ Identify and approach potential champions within firm leadership early in the process.

Research & Compare Solutions

What comes next is exhaustive research, signing up for trials and requesting demos, meeting with software sales representatives, and soliciting estimates. Take the time to complete this phase thoroughly because the quality of your research will directly impact the impact of your presentation.



Action Items

- Schedule demos with at least 3-5 different vendors, using your needs document as a guide.
- Create a comparison matrix of features, costs, and how well each option meets your documented needs (in this guide).
- Reach out to other paralegals or law firms using the technology for real-world feedback.

Pricing, Costs & Hidden Expenses

The most intense questioning will surround costs, so make sure you understand all aspects of what you are buying and what you are paying. In addition to the price of the software or the subscription, there may be other fees to consider.

- Initial purchase/setup costs
- Annual/monthly subscription fees
- Training costs (initial and ongoing)
- Ongoing support costs (including any tiered support options)
- Potential hardware upgrades needed
- Contract terms and exit costs (if any)
- Data migration costs (if applicable)

Vendor Evaluation Matrix

You've got the knowledge—now here's your power tool. This comparison table turns your tech insights into actionable data. Use it to cut through vendor noise, spotlight the best solution, and make a decision that transforms your firm's capabilities.

You can easily reproduce and tailor this evaluation matrix to your personal needs. Feel free to add, remove and edit row labels to accurately compare the products and services you are interested in.

	Vendor 1	Vendor 2	Vendor 3
COMPANY PROFILE			
Website link	www.V1.com	www.V2.com	www.V3.com
Years in business	2	25	7
Company size	11-50	200-1,000	100-499
G2 review rating	2.5	4	3.9
PRODUCT FEATURES			
Product page link	V1.com/P1	vendor.com/P1	vww.com/P1
Feature 1	Yes	Yes	Yes
Feature 2	Yes	No	Yes
Feature 3	No	Yes	Yes
Data & Analytics	Dashboard	N/A	Extra charge
Customization	Free	Extra charge	N/A
Ease of use	Hard	Average	Easy
User seats	3	5	10

	Vendor 1	Vendor 2	Vendor 2
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PRICING

Cost/month	\$250	N/A	N/A
Cost/year	Yes	\$4,000	\$5,750
Set up costs	N/A	\$500 (fixed)	N/A
Cost/extra user seat	\$25/month	\$300/year	\$235/year
Contract length	Monthly, rolling	1 year	3 years
Cancellation policy	Any time	60 days	180 days
Data encryption	Yes	Yes	Yes
2-factor authentication	No	Yes	No

SUPPORT & SERVICES

Support hours	Dashboard	N/A	Extra charge
Avg. wait time	15 min	1-2 hours	24 hours
Training courses	Yes, free	No	Video library

How to Handle Objections

The key here is to anticipate objections and prepare thoughtful, data-driven responses.

When proposing new technology, you may encounter resistance. Here are some common objections and strategies to address them.

Make sure to prepare these ahead of time so you don't feel like you're on the back foot during these negotiations. To do so, start by checking out the five most common rejections and how to respond.

Objection	Counter Argument
<p>"It's too expensive."</p>	<p>Refocus discussion on long-term savings</p>
	<p>Explore alternative pricing models</p>
<p>"Our current system works fine."</p>	<p>Provide specific examples of inefficiencies</p>
	<p>Show how new technology addresses these pain points</p>
	<p>Present examples of similar firms that have benefited from the technology</p>
<p>"It's too risky to change our established processes."</p>	<p>Explain built-in data security measures</p>
	<p>Propose a pilot program or trial period</p>
<p>"We don't have time for implementation and training."</p>	<p>Emphasize long-term time savings</p>
	<p>Highlight vendor-provided training and support</p>
<p>"Our clients won't like it."</p>	<p>Show how the technology can improve client service</p>
	<p>Propose client communication strategies about the benefits</p>
	<p>Share examples of positive client reactions from other firms</p>

Pitch Like a Pro

Great! You've done the research, now it's time to take the floor. Before you step into that meeting, make sure to practice, practice, practice!

Present your deck to a peer, friend or yourself–this will help you identify areas where you struggle, refine arguments and ultimately, give you a chance to say the wrong things, so you can say it the right way when it matters.

Here are some insider tips to keep your audience engaged and increase your chances of success when you're making the pitch.

1. **Hook Them Fast:** Open with a compelling statistic or anecdote that immediately highlights the need for change.
2. **Keep It Snappy:** Deliver your key points concisely and use engaging examples to maintain interest, respecting your audience's time and attention span.
3. **Paint the Picture:** Illustrate the practical impact of the technology through relatable before-and-after scenarios of daily workflows.
4. **Engage with Questions:** Strategically ask thought-provoking questions to involve your audience, gauge their perspectives, and address concerns in real-time.
5. **End with Action:** Conclude your presentation with a clear, specific recommendation and outline of next steps to propel the decision-making process forward.

Remember, You've Got This!

Getting a firm to part with money and adapt technology can be a battle. But for those willing to do research and build a case, it's a battle you can win. By following this comprehensive guide and utilizing the practical tools provided, you'll be well-equipped to make a compelling case for new technology at your firm.

Remember, the key to success lies in thorough preparation, clear communication of benefits, and a solid plan for implementation.

Your efforts can lead to increased efficiency, improved job satisfaction, and better service for your clients. Even if your proposal isn't immediately accepted, you'll have demonstrated initiative and a commitment to improving firm operations, which is valuable in itself.

Founded on the simple idea that deposition services shouldn't be an obstacle when trying to win a case, Steno is at the forefront of the court reporting and legal technology industries. Steno focuses on providing attorneys with innovative tools and options that overcome the technological and financial hurdles that arise when proving a case. As a partner in the pursuit of justice, Steno understands the unique challenges faced by legal professionals and is committed to delivering practical, impactful solutions.

To learn more about Steno or to request information about its services, visit <https://steno.com>

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