

Technology Products for Lawyers and Law Firms

Updated January 2022



The different services and products below are provided to assist lawyers explore legal technology which may assist their practices. They are examples of products available to lawyers. LAWPRO and practicePRO do not endorse third party products or services. Lawyers should consider the appropriateness of such products for their practices

Technology can help lawyers practice more effectively and efficiently. A number of products are available that can assist with law office tasks and help lawyers provide legal advice to clients. When considering adopting a new tool, give yourself time to learn how to use it and consider watching online tutorials or other training. Be sure to consider security as well. For further resources on implementing technology tools in your practice, see our related resources at practicepro.ca/technology.

Calendaring		
Acuity Scheduling	Acuity Scheduling allows users to book appointments online. Users can sync calendars to make the process even more efficient.	Tutorial
Calendly	Calendly lets users book meetings online without back and forth emails. Users can send their availability to other parties and let them select a mutually beneficial meeting time.	Tutorial
Doodle	Doodle helps users book meetings by sending available time slots and allowing others to choose the best time for all parties.	Tutorial

Collaboration, Task Management and Workflow Tools		
Avvoka	Avvoka is an end-to-end document automation tool with features that include no-code automation, advanced templating, clause libraries, and workflow automation.	User Guide
Confluence	Confluence is a collaborative workspace where teams and knowledge meet. It allows users to capture project requirements, assign tasks and manage several calendars at once.	Tutorial
Documate	Documate turns template documents and forms into intelligent workflows, helping to reduce the time to generate document sets.	Tutorial
Legalboards	Legalboards allows users to visually track, organize, and manage matters. It provides tools for matter planning and progression, activity tracking, team collaboration, and integrating data.	Tutorial
Microsoft Teams	Microsoft Teams is an online hub where users can chat, meet, call and collaborate regardless of where the users are located.	Tutorial
Neota Logic	Neota Logic is an automation platform used for case intake and assessment, compliance, contract automation, managing tasks and complex processes, and expertise automation that creates web-based solutions to guide users through digital interviews, gather facts, apply reasoning to information collected, and produce customized outputs.	Tutorial
Procertas	Procertas aims to deepen relationships and improve dialogue between law firms and law departments and includes software training.	Tutorial

Slack	Slack is an online hub that allows users to communicate regardless of where the users are located.	Tutorial
Toodledo	Toodledo allows users to create lists, add notes and collaborate with family and friends. It also tracks the user's habits to help organize and allow for more efficiency.	Tutorial
Trello	Trello is a list and progress platform that allows users to make lists and track progress as they go.	Tutorial
WiseTime	WiseTime is an automatic time tracking program that allocates time worked to specific clients and cases.	Tutorial
Zapier	Zapier automatically moves information between the apps you use to streamline processes.	Tutorial

Document Signing

Adobe Sign	Adobe e-sign allows users to electronically sign documents, send documents to other people for their signatures and get automatic notifications and reminders.	Tutorial
DocuSign	DocuSign is a platform for digital signatures.	Tutorial

Firm Management Software

Clio	Clio is a cloud-based legal practice management platform. It enables law firms to track deadlines, manage cases and documents, bill clients, and accept payments.	Tutorial
Cosmolex	Cosmolex is a cloud-based law practice management software that manages trust and business accounting, time-tracking, billing, email and document management, tasks and calendaring.	Tutorial
Filevine	Filevine is a cloud-based case management solution for small and mid-sized legal firms for managing case documents, communication and file management. For Canadian clients Filevine uses Amazon Web Services' Canadian servers.	Tutorial
Ghost Practice	Ghost Practice is an all-in-one practice management solution including case management, document management, time tracking, billing and accounting.	Request a Demo
iManage	iManage combines artificial intelligence, security and risk mitigation with document and email management. It can be configured to have data stored on Canadian servers.	Tutorial
Matter365	Practice management software that fully integrates into Office365.	Tutorial
PCLaw Time Matters	PCLaw Time Matters offers two practice management solutions (which may be used separately or together). PCLaw is an all-in-one practice management solution providing matter management, billing, and accounting solution software. It tracks trust accounting, client management, tracks billable hours, billing, and accounting. Time Matters is a case matter practice management program, including contacts, email, documents, research, and matter management. It integrates with a variety of other software products.	Tutorial - PCLaw Tutorial - Time Matters
Soluno	Soluno is a time, billing and accounting solution for law firms. (Not available for Mac/OSX)	Tutorial

Note Taking		
Evernote	Take notes, find information, save web pages, create to-do lists and share ideas with others.	Tutorial
iAnnotate	iAnnotate is an app by Folia that allows users to markup PDF files with highlighting, diagrams, notes and audio comments.	Tutorial
Microsoft OneNote	Microsoft note taking software allows users to create notes, set tasks and manage their affairs.	Tutorial
Notability	Notability allows users to combine handwriting, photos and typing, all in one note. Users can also add and annotate PDFs in Notability.	Tutorial
Otter.ai	Otter.ai is an AI transcription assistant, which creates voice notes from meetings, interviews, and other conversations	Tutorial

Payment Solutions		
LawPay	LawPay provides a payment management solution that separates earned and unearned accounts. LawPay also organizes payments coming through from clients.	Tutorial
Square	Square is a hardware device that allows the user to accept any payment method, including credit card or debit, using tap and chip & PIN.	Tutorial
Stripe Payments	Stripe Payments is a complete payments platform that accepts payments and moves money globally using APIs and software solutions.	Tutorial

Security		
1password	1Password provides a place for users to store various passwords, software licenses, and other sensitive information in a virtual vault. Canadian users who sign up at 1password.ca have their information stored on Canadian servers.	Tutorial
Authy	The Authy app generates secure 2 step verification tokens on your device. It helps users protect their account from hackers and hijackers by adding an additional layer of security.	Tutorial
BitLocker	BitLocker is a built-in feature to certain Microsoft versions, designed to protect data by encrypting entire volumes. BitLocker locks the entire operating system partition and requires a specialized key to unlock the operating system.	Tutorial
Lastpass	LastPass saves and remembers your passwords and is accessible throughout all the user's devices.	Tutorial
Microsoft Authenticator	Microsoft Authenticator protects all of your accounts with two-step verification. The app also helps you secure all of your online accounts by using the industry standard time-based OTP (one-time password) codes.	Tutorial

Social Media & Marketing

Canva	Canva is a graphic design platform with design features for presentations, calendars, graphs, planners, letterheads, business cards, and more.	Tutorial
Hootsuite	Hootsuite is a social media management platform where users can manage all their social media accounts from one place.	Tutorial

Surveys and Form Building

Google Forms	Google Forms is a survey administration application. Forms collect information from users via a personalised survey or quiz.	Tutorial
Simple Survey	Canadian based survey and form creation tool, with data hosted in Canada.	Tutorial
SurveyMonkey	SurveyMonkey provides free online survey tools.	Tutorial
Typeform	Typeform provides software that specializes in online form building and online surveys.	Tutorial

Telephone, Internet and Fax

Ubyty	Ubyty provides cloud-based telephone services and fax and voicemail services.	Tutorial
Vonage	Vonage offers, phone service, internet and paperless fax, amongst other services.	Tutorial

Video Conference Software

GoToMeeting	GoToMeeting allows users to join, host or manage a meeting through video conferencing.	Tutorial
Skype	Skype enables individuals and businesses to make free video and voice calls, send instant messages and files to each other.	Tutorial
Webex	Webex provides video conferencing, online meetings, screen share and webinars.	Tutorial
Zoom	Zoom provides video conferencing software. Multiple users can share their screens concurrently and co-annotate for collaborative meetings.	Tutorial

Voice Dictation and Transcription

Dragon Speech Recognition	Dragon allows professionals to dictate and the software will automatically assess and transcribe what is dictated to a document.	Tutorial
Microsoft Word	Word for Microsoft 365 dictation allows for speech-to-text using your microphone.	Tutorial
SpeechExec	SpeechExec is a speech-to-text dictation and transcription software.	Tutorial

Writing and Editing		
Grammarly	Grammarly assists writers to produce clean and mistake-free writing and offers suggestions that go beyond just grammar.	Tutorial
TextExpander	TextExpander lets users instantly insert snippets of texts from a database of emails, boilerplate and other content, concurrently as the user types.	Tutorial
WordRake	WordRake is an automated, in-line, editing software. WordRake can make documents or emails clearer, shorter and better overall. It can be added to Microsoft Word and Outlook.	Tutorial

Tools for Specific Areas of Law

Corporate/Commercial		
Appara	Appara is an end-to-end document automation and records management software. It includes closing features like eSigning and eFiling, and entity-management features such as compliance tracking, document automation, and virtual minute books.	Resources
Athennian	Athennian provides solutions for managing corporate entities, corporate compliance, automation of manual processes, organizational charts, reporting and analytics, and access and integration features, which include virtual minute books.	Tutorial
Closing Folders	Closing Folders helps lawyers manage legal transactions by automating the collection of signatures and the creation of closing books.	Tutorial
Dealcloser	Dealcloser is a transaction management hub that brings lawyers and clients together on a deal, providing tools like checklists, closing agendas, document collaboration, and signature management.	Tutorial
Diligen	Diligen is a machine learning software that provides fast, high quality contract analysis and review for due diligence purposes.	Request a Demo
MinuteBox	MinuteBox is a platform used to manage legal entities and corporate records. Features include document sharing, data migration from other entity management platforms, calendars, tickler systems, and virtual minute books.	Request a Demo
Kira	Kira is a machine learning software that identifies, extracts, and analyzes the contents in contracts and documents for due diligence purposes.	Resources
Lienfluent	Lienfluent is a platform used for reviewing and documenting PPSA searches.	Request a Demo

Family Law		
Divorcemate	Divorcemate provides cloud-based family law solutions including child and spousal support calculators, court forms and family law precedents.	Tutorial
Settify	Settify is a platform that interacts with family law clients in real time to deliver guidance on legal issues and synthesize client information, which is then provided to their lawyer.	Tutorial

Litigation		
CaseFleet	CaseFleet allows lawyers to manage litigation files and organize facts, issues, and sources.	Tutorial
Citeright	Citeright is a legal research tool that allows users to save the research they have done and lives in Microsoft Word as an add-on.	Tutorial
Evichat	Evichat provides a service that organizes messages for users, specifically for evidentiary needs. It can handle messaging between users and organize messages, such as websites and other evidence, helping declutter messages.	Tutorial
Logikull	Logikull is an e-discovery platform that organizes evidence the parties intend to use.	Tutorial
Page Vault	Page Vault helps legal professionals capture web content, such as Facebook, videos, and websites, and creates an easy-to-print PDF.	Tutorial
Primafact	Primafact is a document management software for litigation practice.	Tutorial
TrialPad	TrialPad allows users to store and access documents from their iPad. It includes presentation tools, highlights text, creates side-by-side document comparisons, edits and shows video clips, adds exhibit stickers to documents and searches document texts.	Tutorial

Wills and Estate Planning		
eState Planner	eState Planner simplifies the process of estate planning by collecting client information, creating the estate plan and importing editable documents.	Tutorial
Estate-a-Base	Estate-a-Base software records particulars of your various estate files, and automatically produces estate documents such as court forms, inventory of assets, and proposed distribution.	Tutorial
WILLBUILDER	WillBuilder provides a visual approach to creating wills and powers of attorneys.	Tutorial
WillPowerWeb	A wills and powers of attorney production and management system. Features customizable reports to clients and practice management features to track document preparation.	Request a Demo

This document was initially developed by Juda Strawczynski, Director, practicePRO and Eli Goldberg, Articling Student, and has been subsequently updated