**Technology Product Assessment Worksheet [Product Comparison]**

Use this worksheet to help evaluate technology you are considering adopting.

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| **PRODUCT INFORMATION** | **Product One** | **Product Two** |
| **Product name** |  |  |
| **Use cases for product in my practice** |  |  |
| **Plan options** |  |  |
| **Cost** |  |  |
|  |  |  |
| **SECURITY** |  |  |
| **Login Security** |  |  |
| Does the product require a user login and password? |  |  |
| Is two-factor authentication available for login? |  |  |
| **Encryption** |  |  |
| Is the transmission of data encrypted?  If your data is stored off-site, is it encrypted at rest? |  |  |
|  |  |  |
| **DATA STORAGE AND RECOVERY** |  |  |
| **Where is the data stored?** |  |  |
| * On my network / cloud server * On the providers’ designated server?   + Is the data stored on a Canadian based server? [Y/N] * Check box – You will continue to own the data |  |  |
| **Access**   * Can all your firm access the data? * Are there options to limit user access to particular data fields? * If you choose to end your relationship with the provider, what access do you have to your data? In what format (ex: PDF; XML spreadsheets etc.) |  |  |
| **Data Use and Privacy Protection**   * Can the data be accessed by others? If so, in what form? If so, do any threaten client confidentiality / solicitor-client privilege? If so, *do not use.* * Can the data be used by the vendor in any way? If so, do any threaten client confidentiality / solicitor-client privilege? If so, *do not use.* * Are these ways you may opt out of certain data uses if you (or you on behalf of a client) are not comfortable with them? If so, do they adequately protect client confidentiality / solicitor-client privilege? *If not, do not use.* * What happens to your data if you end the agreement? If there is a dispute, is there a data escrow service available? |  |  |
| **COST** |  |  |
| What are the fees for the service? |  |  |
| Is the fee reasonable for what is provided? |  |  |
| Are they set or increased based on various factors (ex: number of users / amount of data / etc.) |  |  |
| Are there additional fees for ceasing to use the product? For migrating data to start using the product? For downloading data on ending your relationship with the vendor? |  |  |
| **RISK MANAGEMENT** |  |  |
| **Dispute resolution** |  |  |
| If you have a dispute with the provider, what dispute resolution is available? |  |  |
| **Liability** |  |  |
| **Vendor / Product Viability** |  |  |
| * If there is an error, omission, data breach, transmission of a virus to your systems or other harm caused using the product, what remedies are available? * Does the provider limit liability? Warrant use of the product? |  |  |
| * Is there a significant risk that the vendor may stop operating or stop offering this service? |  |  |
| **LAW FIRM PRACTICE MANAGEMENT** |  |  |
| **Onboarding** |  |  |
| * What steps are required to start working with this technology? * Does it require technical support to launch? * Does it require regular updates? * Is it compatible with your existing technologies or require other upgrades? |  |  |
| **Integration with your practice processes and workflows** |  |  |
| * Does the technology integrate into your existing processes and workflows or *improve* on your processes? * If it will be used to create a *new* workflow, ensure you document it, and train staff |  |  |
| **Training** |  |  |
| * What training will be available for staff to use this technology? (Does this add cost?) |  |  |
| **Insurance**  Does the product have insurance or provide a warranty? What are the key conditions? |  |  |
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| **OTHER CONSIDERATIONS** Note any other considerations you believe you need to consider before selecting / using a new product |  |  |

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