



GENERAL CLOUD PLATFORM IMPLEMENTATION CHECKLIST FOR LAW FIRMS

This checklist provides a high-level overview of essential tasks for implementing a cloud productivity suite (e.g., Google Workspace or Microsoft 365) in a law firm. While specific steps may vary by platform, these common phases and considerations apply to both.

PHASE 1: PLANNING AND ASSESSMENT

- ☐ **Define Project Scope and Objectives:**
 - ☐ Identify key stakeholders (IT, legal teams, management).
 - ☐ Determine which services and data will be migrated or configured (email, documents, calendars, communication tools).
 - ☐ Set clear success criteria and realistic timelines.
 - ☐ Assess current IT environment and infrastructure.
- ☐ **Legal and Compliance Review:**
 - ☐ Identify all relevant data residency, privacy, and compliance regulations (e.g., HIPAA, GDPR, state bar rules).
 - ☐ Review existing data retention policies and legal hold requirements.
 - ☐ Verify the chosen platform's compliance certifications and features against firm's obligations.
 - ☐ Consult with legal counsel regarding ethical duties related to cloud adoption and data handling.
- ☐ **Data Audit and Cleanup:**
 - ☐ Identify redundant, obsolete, or trivial (ROT) data.
 - ☐ Archive or delete unnecessary data to reduce scope and cost.
 - ☐ Review existing data permissions and access controls.
- ☐ **License/Edition Selection:**
 - ☐ Choose the appropriate platform edition/license based on firm size, required features (e.g., eDiscovery, DLP, advanced security), and budget.
- ☐ **Develop Communication Plan:**
 - ☐ Outline communication strategy for all firm members before, during, and after implementation.
 - ☐ Address potential concerns and highlight benefits of the new platform.
- ☐ **Identify Implementation Tools and Resources:**
 - ☐ Research and select any necessary third-party tools or services.
 - ☐ Determine if external specialists or consultants are needed.
 - ☐ Identify and train internal IT staff or project leads.

PHASE 2: PRE-IMPLEMENTATION PREPARATION

- ☐ **Prepare Cloud Environment:**
 - ☐ Verify firm's domain with the chosen cloud provider.
 - ☐ Configure Organizational Units (OUs) or user groups mirroring firm structure.
 - ☐ Set up initial security policies (MFA, password policies, admin alerts/roles).
 - ☐ Configure data region for storage if required.
- ☐ **User Account Provisioning:**
 - ☐ Create user accounts for all firm members.



- ☐ Ensure email addresses and aliases are correctly configured.
- ☐ **Network and Bandwidth Assessment:**
 - ☐ Ensure sufficient network bandwidth for cloud service usage.
 - ☐ Optimize network settings for cloud connectivity.
- ☐ **Pilot Program (Optional but Recommended):**
 - ☐ Select a small group of users for a pilot implementation.
 - ☐ Test core functionalities and gather feedback.
 - ☐ Refine implementation plan based on pilot results.

PHASE 3: IMPLEMENTATION AND CONFIGURATION

- ☐ **Email and Calendar Setup:**
 - ☐ Configure email routing (MX records) to the new platform.
 - ☐ Set up shared mailboxes, resource calendars, and distribution lists.
 - ☐ Configure email retention policies.
- ☐ **Document Management and Storage Setup:**
 - ☐ Establish logical folder structures for client files and firm documents.
 - ☐ Configure shared drives/sites for team collaboration.
 - ☐ Set up document versioning and recovery options.
 - ☐ Configure offline access capabilities.
- ☐ **Communication and Collaboration Tools Setup:**
 - ☐ Configure chat and video conferencing tools (e.g., Google Meet, Microsoft Teams).
 - ☐ Set up channels/spaces for case teams and internal departments.
 - ☐ Integrate file sharing within communication tools.
- ☐ **Security and Compliance Configuration:**
 - ☐ Implement advanced security features (e.g., DLP, information protection/classification).
 - ☐ Configure eDiscovery and legal hold capabilities.
 - ☐ Set up comprehensive audit logging and monitoring.
 - ☐ Define and apply data retention policies.
- ☐ **Application Integration:**
 - ☐ Integrate with existing legal practice management software, e-signature tools, and other critical third-party applications.

PHASE 4: POST-IMPLEMENTATION AND OPTIMIZATION

- ☐ **Data Verification and Integrity Check:**
 - ☐ Verify that all data is accessible and intact in the new platform.
 - ☐ Conduct user-led validation and spot checks.
- ☐ **User Training and Adoption:**
 - ☐ Provide comprehensive training to all firm members on using the new platform.
 - ☐ Focus on workflow-specific training and best practices.
 - ☐ Establish ongoing support resources and internal champions.
- ☐ **Performance Monitoring and Optimization:**
 - ☐ Monitor platform performance and user feedback.



- ☐ Optimize configurations for efficiency and user experience.
- ☐ Explore and implement advanced features and integrations.
- ☐ **Ongoing Governance and Maintenance:**
 - ☐ Establish clear governance policies for data management, security, and user access.
 - ☐ Schedule regular security audits and compliance reviews.
 - ☐ Plan for continuous user education and updates on new features and policies.