

# Word LX vs In-House Templates

A 20-point evaluation checklist for law firms comparing Word LX to building a template solution in-house. Score each point. Total the score. Discuss with your IT, KM, and partner leads.

Check each box where the answer is **YES** for your firm. Each checkbox is worth one point. The lower your score, the stronger the case for Word LX. The higher your score, the stronger the case for building in-house.

## CATEGORY 1

### Build Time and Cost

- We have named, dedicated IT capacity for this project for 5+ years
- We can absorb a 4-6 month build timeline without affecting other initiatives
- We have budgeted for ongoing developer time after launch
- We have run a build-vs-buy ROI projection across a 3-year horizon

## CATEGORY 2

### Governance and Ownership

- We have a named template owner with a documented succession plan
- We have an audit log for template versions and changes
- We have a process for approving new clauses or template updates
- We have survived a leadership change without losing template continuity

## CATEGORY 3

### Lawyer Adoption

- We have a documented training plan for new associates and laterals
- We have a change-management process for rolling out template updates
- Partner buy-in is documented (not assumed)
- We can measure adoption rates across practice groups

## CATEGORY 4

### Maintenance and Updates

- We have a regular clause refresh cadence (quarterly or better)
- We have a brand refresh process that touches all templates
- We have version control and rollback for templates
- Template tickets are not consistently deprioritized

## CATEGORY 5

### Integration and Future-Proofing

- Our templates integrate cleanly with our current DMS (iManage, NetDocuments, or similar)
- Our templates work with our matter management system (Actionstep, Clio, or similar)
- Our templates are ready to integrate with AI assistants (Copilot, Harvey, Claude Cowork)
- Our templates can survive a DMS migration without a full rebuild

## HOW TO READ YOUR SCORE

- **16 to 20 points:** Building in-house is a defensible choice. Document your governance plan and re-run this checklist annually to make sure it still holds.
- **8 to 15 points:** The build case is shaky. Word LX or a vendor solution likely beats your build math over a 3-year horizon. Worth a 20-minute conversation.
- **0 to 7 points:** The hidden costs are about to surface. Talk to Word LX before you sign the next IT ticket.

## Talk to Word LX about your results.

Free 20-minute walkthrough. We will run the comparison with you, including the six hidden costs your spreadsheet is missing.

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