

The Document Automation TCO Worksheet

Price two quotes against each other over 3 years, including the costs the proposal leaves out.

Fill this in before you compare vendors

Cost line	Vendor A	Vendor B
Annual licence x 3 years Per user, per template, per matter, or flat		
Implementation and configuration One time. Typical range \$5,000 to \$20,000		
Template build Templates x hours each x internal hourly cost		
Data and content migration One time. Typical range \$2,000 to \$10,000		
Training Year 1 sessions plus billable time of attendees		
Document management system integration Ask for this as a separate written line		
Internal maintenance owner x 3 years Fraction of a role x salary. Often 0.1 to 0.25		
Renewal uplift, years 2 and 3 Capped or uncapped. Get it in writing		
3 YEAR TOTAL COST OF OWNERSHIP		

Read this before you sign. Across the category, the software licence accounts for roughly 40% to 55% of a 3 year total. A quote that gives you only a per user price is showing you about half the number you will actually spend.

A worked example to calibrate against

A 30 lawyer firm putting 10 users on a per seat platform at \$160 per user per month. Licence **\$19,200 a year**. Implementation **\$12,000**. Migration **\$6,000**. Training **\$3,000** then \$1,000 a year. Maintenance owner at 0.15 of a role, about **\$12,000 a year**. Year one lands at **\$52,200**. 3 years lands at **\$133,600**, and the licence is 43% of it.

Ask about template 41

Find out how many templates the fee covers and what the next one costs. This is where quotes diverge most.

Ask who builds them

Your team or theirs, and how many hours per template. Convert the answer into internal cost.

Ask about the exit

What happens to your templates if you leave. A proprietary format is a cost you pay later.

Want the number for your environment

We will map it to your template set, your DMS, and your practice areas.

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