# SUITE LAW

## Suite Law Onboarding Process & Pricing Guide

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### 💼 Overview

Onboarding with Suite Law ensures your law firm is fully set up for success from day one. We handle every step—from migrating your data and rebranding your templates to configuring user access and training your staff—so your team can hit the ground running.

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### ◆ Phase 1: Discovery & Planning

**Goal**: Understand the unique needs of your law firm.

- Kickoff consultation with key stakeholders.

- Review current practice areas, document templates, workflows, calendars, and billing processes.

- Identify required modules, user roles, permissions, and customizations.

- Evaluate data sources for migration (existing systems, spreadsheets, etc.).

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### ◆ Phase 2: System Configuration

**Goal**: Set up Suite Law based on your firm's structure.

- Set up attorney and support staff profiles.

- Configure calendars, reminders, and permissions by role.

- Customize fields, matter types, and intake forms.

- Integrate your email domain with SPF/DKIM setup (if needed).

- Configure time tracking, case billing categories, and status workflows.

◆ **Phase 3: Branding & Template Rework**

**Goal**: Make Suite Law look and feel like your law firm's system.

- Rebrand the 50+ built-in email templates with your firm's logo, name, contact info, and tone.

- Update built-in PDF templates (e.g., client letters, retainers, confirmations).

- Apply firm-specific language to automated workflows and notifications.

◆ **Phase 4: Data Migration**

**Goal**: Transfer your existing client/matter information securely and accurately.

- Export data from your current system or spreadsheets.

- Clean and format data for Suite Law's structure.

- Import clients, contacts, matters, billing records, calendar events, and notes.

◆ **Phase 5: Staff Training & Launch**

**Goal**: Ensure your team is confident and comfortable.

- ½ day of live training (in person or via Zoom).

- Unlimited access to training videos and tutorials.

- Guided walkthroughs for common tasks like intake, time tracking, billing, etc.

- 30-day post-launch check-in and adjustment session.

⚒️ **Ongoing Support (Included)**

- Email and phone support for onboarding issues.

- Access to Suite Law's knowledge base and update guides.

- Monthly product updates and improvements.

**💵 Pricing**

**📦 One-Time Onboarding Fee**

Includes everything listed above:

| Firm Size | Fee |
|---|---|
| Solo / Small (1–3 users) | $699 |
| Mid-Size (4–10 users) | $999 |
| Large (11+ users) | $1,499–$2,499 |

**Includes**:

- Up to 4 hours of customization

- Data migration from one source (additional sources billed at $150/hr)

- All email/PDF templates rebranded

- Staff and attorney setup

- Live training

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**💻 Ongoing Subscription**

**$249/month**
▫ Unlimited users
▫ All features included
▫ Regular system updates
▫ Workflow and automation tools
▫ Built-in document, case, calendar, and billing management

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