RUPERT HAWKE LEGAL

A Guide to Successful Legal Software Implementation

Over the last few years Legal firms have been subject to an increased rate of change in their environments coupled with a reduction in margins across a wide range of disciplines. Times are undoubtedly tough and Firms need the systems to be able to steer themselves through these choppy waters.

Software systems need to provide operational synergies for fee-earners and also accurate and meaningful management information to allow operational and strategic decision-making. The system should therefore be a fundamental part of the firm's set-up with the ultimate goal of adding value to the firm. Whilst there is investment cost this can be far outweighed from the benefits of a successful implementation.

Many firms make mistakes when purchasing a system. They often have no idea of what they need or what they want to achieve. Systems are clumsily introduced with no input from staff who in turn becomes disillusioned and often the software is only partially utilised.

The framework for success for implementing Legal software is the '3 Ps' – referring to the 3 critical elements – **Provider, Product, & Project**. Within these elements there are key criteria that are imperative to a successful software implementation.

Provider

- Ensure the Provider is likely to be trading into the future. By providing the software they are an integral stakeholder within your business and a firm could be left exposed if their software supplier (and related support) ceases to exist. Check Companies House for indicators of strength and sustainability.

- Insist that the supplier provides site references and follow them up. This will provide the real measure of the supplier and its product.

- Ensure that the supplier has the expertise in the areas of Law you practice. For example do they keep abreast with LAA form changes? Will they be able to understand and update their system for a regime change in Advocate billing? Test their knowledge – law is very much a specialist area and you will need many specifics within your system.

- Develop and maintain a good relationship with your supplier – remember you are partners and can help each other. A breakdown in relations will harm the level of service you receive and you will be dependent on the supplier in terms of system support.

Product

- Is the software suitable for the size and diversity of your firm? Can it provide what you want? A thorough testing of the system should confirm this.

- Whilst it is important to compare costs of software, try and gauge the likely returns you might receive from each package. This is difficult but do evaluate some base pointers. For example, how quickly does it take to set-up a case or bill a file? What level of management reporting is provided? Many of these benefits are intangible but should usually take precedence over cost depending on their magnitude.

- Is the system easy to use? Get users to try a potential system and get their feed back. Use the site references for further consideration.

- Is the system sustainable? Has it the capacity to grow with a changing legal environment? Flexibility is essential in the Legal industry software.

Project

- A senior member of the firm needs to lead the project and just as importantly be seen to lead the project. This leadership role should continue after implementation is complete to ensure momentum is maintained with the system going forward.

- The project should be planned and a delivery date agreed amongst stakeholders. A time plan (such as a Gantt chart) should be used to ensure required tasks are undertaken when required.

- The firm should ensure that all future users 'buy-in' to the project. By getting users involved initially, chances of rejection will be reduced when the system goes live. The project leader can ask users to deliver areas of the project. This will greatly aid motivation from staff towards the ever difficult issue of change.

- All future users should be invited to test the system. Brainstorming issues they are likely to encounter and then testing them on the new software will help iron out problems before going live.

There are plenty of systems on the market and it is key to source a product that will work best for your firm. Many system implementations fail due to a lack of planning and understanding. A careful decision on product coupled with a comprehensive project plan can provide firms with real added value and competitive advantage in their market place.