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4 Tips on How to Begin Using Legal Practice Management Software

developers · Friday, April 24th, 2020

There are many similarities between managing a practice management implementation and being a coxswain on a rowing team (for those who don't know what a coxswain is, it's the person who sits on the end of the boat and motivates the team to row faster) – your job is to make sure everyone is working in unison to achieve a common goal. If everyone rows hard together, you win the race, but if everyone is rowing at different speeds, the boat gets turned around in a different direction.

Over the past few years, I've been watching law firms successfully and unsuccessfully adopt practice management software. Very rarely do you get everyone "rowing" at the same speed right from the starting gun, but there are things you can do to make the transition smoother for your employees and increase your adoption rate.



1. Begin with the highest value changes

If you're at the point of implementing practice management software, you should have a list of the features you wanted to implement because you had to pitch this list of features to the management team by explaining the benefits. If you don't have a list, stop what you're doing and make one right now!

Take this list and begin putting together a plan of attack. Personally, I like to first implement the features that bring the highest value and are the easiest to implement. This way, your team members quickly see the benefit of the software and your team morale is heightened.

If you're having a hard time prioritizing, make a list of the features. Next to the list of features create two columns, one for "highest impact" and one for "easy to implement." For the highest

impact column, take the total number of features you've listed and begin to number them with the lowest number as the least impactful feature and the highest number as the most impactful. Next, do this same exercise for the "easy to implement" column with the lowest number being the hardest to implement and the highest number as the easiest to implement. Then, add up each row and begin implementing the row with the highest total first.

2. Roll it out in stages

I've seen law firms do entire practice management, billing, and document management software implementation at once, and although it's possible, I don't recommend it. I also don't recommend going from 0 to 100 using practice management software either.

Why is this? It's a big change for your staff and it can cause you a lot of personnel headaches along with a low adoption rate of the new software.

3. Pick super users at your firm

It's always a good idea to have a few super users on staff. These super users are typically staff members that are more technical and well-respected amongst their coworkers. These super-users will do a few things at the firm:

- They'll help troubleshoot problems once the software trainers finish.
- They'll communicate with the software vendor when there are support issues.
- They'll help boost morale when employees get frustrated with the software because they can't figure out how to do something or a feature takes one more click than it did before.
- They'll conduct ongoing training for staff to make sure there is a high adoption rate.
- They'll take in all the ideas staff members have for making the program a better fit and either customize the software themselves or contact the vendor with a slimmed-down list of changes.

4. Invest in training

Many people view training costs as an added expense, but in reality, it is a vital investment because of its ability to boost adoption rates for any software at a firm. If this is the first time your firm has used legal practice management software, training is especially important because it's new to your staff.

Training should be broken out into multiple sessions. In my experience, the staff begins to lose focus after about an hour.

We have a lot of great material on [investing in your training](#) and [how to create a legal practice management software training program](#).

Implementing legal practice management software is rarely a walk in the park but if you commit to the steps above and have the right implementation specialist, I am confident your team will be more willing to make the leap. If you have more questions about implementing legal software, feel free to reach out to us – we are happy to help.

This entry was posted on Friday, April 24th, 2020 at 12:00 am and is filed under [Practice Management](#)

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