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Critical Factors for a Flawless Legal Software Implementation

Katie Langer · Tuesday, July 30th, 2024

As you search for new law practice management software, you shouldn't settle for a painful implementation process — which is the largest obstacle preventing law firms from embracing new and better software.

With the right components in place, a legal software platform can provide an accurate and efficient implementation with minimal business disruption — so you can start making strategic and profitable business decisions immediately.?

Here's what you should look for in a well-mapped legal software implementation process when searching for the right vendor.

Professional People to Organize Legal Software Implementation

As you're narrowing down your law practice management software options, ask each vendor if they have a dedicated team that will focus on delivering an exceptional implementation.

A comprehensive implementation team should include project managers and data specialists that organize your implementation and deliver accurate data imports, and support, training, and customer success teams that champion your firm's success throughout your firm's experience — including post-implementation.

Proprietary Implementation Processes??Minimize Disruption

What is the actual implementation process for each vendor? You'll want to understand how thoughtfully they've mapped each phase of implementation, and what tools will be used to migrate

your firm's data to the new software.

Any software implementation must deliver correct data in the way you intend to use it and do so with minimal business disruption. Ask the vendors specific questions about each phase of the implementation process to understand if they can deliver on this expectation.

Initial software implementation phases

The early stages of an implementation process should:

- Outline your firm's current workflows, processes and pain paints

- Define your requirements and goals

- Establish a project plan and timeline, including a final implementation date

- Introduce your stakeholders to the onboarding platform to be used

Data migration and testing phase

Accurate data migration is critical to successful implementation of law practice management software that your team wants to use. Look for the following in vendors' data migration phases:

- Opportunities to validate your data through test migrations and access to test data

- Ability to set data expectations and configure data to fit your firm's needs

- Opportunities to engage with your data prior to final implementation

Configuration, testing and training phase

Having accurate, ready-to-use data in the system allows your team to start learning how to use the new software. Ask vendors how they handle:

- Setting up role-based permissions

- Training sessions to teach your team how to get value out of the system, tailored to your firm's business and processes

- Final functionality testing to ensure everything is ready for launch

Final software transition and beyond

When the official switch to the new software begins, you'll want it to be as seamless as possible. Vendors should have plans to minimize business disruption by walking your team through:

- Billing generation

- Using templates

- Reviewing financial data

- Live support and customer success plans

Of course, you also need to feel confident a vendor will continue to help your team reap the benefits of the new software as your firm grows and changes.

- Is there dedicated account management? What about tech support?

- What continued training options exist?

- Can further adjustments be made post-implementation?

Why organized implementations for legal practice management software matter

Your new legal technology investment should help your firm become more efficient and profitable. If it offers the features to help you accomplish your firm's goals, ensuring it also has an efficient and accurate implementation process will allow you to extract that value from day one of using the software.

Be selective, and hopefully you'll experience a software implementation that minimizes business disruption like Susie Saldivar, Office Manager at Gaido & Fintzen.

"The onboarding process [with our legal software vendor] could have been terrible and glitchy, but, instead, it was super dreamy," she says. "I couldn't have asked for a better onboarding experience. Everything went great."

Get all the details for what makes an accurate and timely implementation here.

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