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Determining the Right Time to Evaluate New Technology

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Timing is everything. This old adage holds true even when thinking about upgrading technology.

Maybe you've been on legacy software for years. Maybe you work entirely on paper. Perhaps you're still dipping a fountain pen into an inkwell (by the way, if that's the case – *cool*). Wherever you're at, how do you know when it's time to start evaluating new technology?

When firms begin to think about evaluating new software, two distinct mindsets come into play: reactive and proactive. Which one your firm holds will set the stage for how you kick off this process.

Reactive

For firms with a reactive approach to software purchases, one (or more) of the following primary motivations tends to drive them to reevaluate their legal technology:

Server replacement

Just like car batteries, servers don't last forever and eventually need to be replaced.

Picture this: Your server is on the fritz but still operational. Your IT guy says it's got six months to a year at best. Still, you hold off on any major moves and it dies unexpectedly three months later. Now, you're looking at hours of downtime, potential loss of data, and thousands of dollars to replace it.

A reactive firm will wait until its server is at the end of its life, which forces them into making a sudden choice to either buy a new one or move everything to the cloud. Since buying and maintaining a server is such a big capital expenditure, at this point, the firm often realizes that the costs associated with replacing the server do not outweigh the benefits of upgrading to [cloud-based technology](#).

Remote work initiatives

Investing in technology that enabled remote work used to be a proactive exercise for law firms. Now, over two years into the pandemic, many have been forced to make a reactive shift to remote work, which is now considered essential.

Remote work was an immediate necessity at the start of the pandemic, but firms are now looking

for ways to evolve these arrangements, which may have been enacted hastily, to make them more efficient, seamless, and responsive. The “make it work” approach is quickly being replaced with a strategic one that identifies areas for improvement sooner rather than later.

No matter where your staff or attorneys are located, they need to have access to their work; if they don't, your firm is going to lose money. Cloud-based technology paves the way for a [more effective remote working environment](#).

SaaS deficiencies and consolidating systems

Many firms already use some form of cloud-based technology, but that doesn't automatically mean they're happy with the software they chose. Their current system could lack features that the firm needs to operate. This is the unfortunate result of poor communication with the vendor, or not being explicit enough about the firm's needs during the initial discussions with the sales team.

Another pain point that often leads firms to switch software is how their data is distributed. If their current software doesn't have the integrations they need to manage day-to-day tasks like [document management](#), [calendar](#), and court deadline scheduling, the firm must rely on additional third-party programs. Working out of multiple systems makes it significantly harder to both run operations efficiently and utilize data effectively enough to make sound business decisions.

Imagine software that has billing features but lacks [accounting](#) functionality. In this case, firms must rely on outside technology for all of their accounting needs, leading to copious amounts of manual work, and, subsequently, more chances for human error. If you've ever had to enter information into multiple systems like this before, you know very well the pain we are talking about here!

Data security issues

According to the American Bar Association, 25% of all U.S. law firms have experienced at least one [data breach](#). In other words, the risk to your firm's information is at an all-time high.

At one point in time, cloud technology was viewed as a security hazard compared to on-premise servers. Today, however, that reality has changed. On-premise servers are at significantly greater risk for breaches because they are exposed to many more physical elements.

The easiest way to take server security off your plate is by working with a cloud-based provider. Ask yourself what you can do better to protect your firm and your clients and how you would react to a breach. The data you handle is sensitive and hackers today use sophisticated techniques to gain access to it. If you aren't relying on companies that protect data for a living to keep yours secure, you are exposing your firm to significant risk. As soon as a security breach happens, a reactive firm is pushed to evaluate new [cloud-based software](#).

If any of those motivations resonated with you, it is time to start looking at new legal technology while you have the leisure to do so.

Proactive

Firms with a proactive approach are intent on staying ahead of any problems and motivated by a desire to improve. Instead of waiting for issues to occur, these firms pursue action-driven solutions

to maximize their operations. This road often leads them to consider cloud-based software much earlier than a reactive firm.

Maximizing cost savings/increasing revenue

If a firm's goal is to increase revenue, the initial reflex for many is to try to hire more attorneys. But, if you leverage the right technology, you can increase revenue by capitalizing on features that allow you to capture more billable time. This can be as simple as the ability to enter time on your commute, or it can be complex like being able to instantly track and create billable events for text messages, calls, and emails as conversations occur.

On average, attorneys only capture 2.3 billable hours a day, so [automatically capturing your time](#) as it happens is the easiest way to grow your business and increase revenue without hiring more staff.

Improving client service

Your clients expect three basic things from you:

- Their information is locked up and secure.
- They are able to access that information at any time without having to jump through hoops.
- They are able to reach you.

Your firm needs to be available. No one hits the panic button faster than a client who either doesn't feel heard or can't quickly get the information they need. When you go with software with advantages like a [client portal](#), you help reduce the number of client calls your staff may receive while helping your firm stand out by giving your clients a quick way to access what they need.

A client portal also helps you achieve autonomous accessibility, which has the added benefit of reducing the time you spend answering their questions.

This responsiveness can be translated into new business as well. When people are searching for representation, oftentimes, it is the firm that responds to their call or email first that wins the business. Not only are these firms setting the tone right off the bat, but they are also making the client feel prioritized – a huge factor when it comes to converting prospects into billable clients. Legal software is the best place to start if you want to improve these aspects of your client experience.

Going paperless/reducing paper

As we all learned these past couple of years, the ability to access files from any location is imperative to today's practices. Firms that were paperless before the pandemic were able to continue their practices without missing a beat. The advantages are valuable outside of a pandemic as well. Digital case files allow your attorneys to access them wherever they are – from court, a client's office, or home.

With all file information hosted in the cloud, firm attorneys and staff can access the files from any location with internet access.

Improving efficiency and productivity

The bottom line: Proactive firms are motivated to meet the current state of technology. They take active steps to adopt modern solutions that may not have existed five years ago, taking note of their current pain points and strategically planning out how they can alleviate them. Generally, they set out to improve current processes, become more efficient, and implement software that allows them to be agile, grow, and develop.

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