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Centerbase CloudBased Law Firm Management & Growth Platform

## Do Law Firms Need a Software Consultant?

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To get the history of practice management consultants within the legal industry, you have to go back about 30 years or more. Back then, all programs were server-based (i.e., not in the cloud), so you needed someone with enough technical expertise to understand how to load your new program onto your server, install all the updates when they rolled out each year, deploy those updates to your server, and ensure everything functioned and was maintained properly.

Ultimately, if a firm needed or wanted to switch to new software, four things needed to occur:

1. Someone had to install the software on the server.
2. Someone needed to transfer your data from the old system to the new software.
3. Someone needed to train and teach your staff how to use the new software. At the time, this process was more laborious and time-consuming because video conferencing services like Zoom weren't around.
4. Someone had to be readily available to answer questions, provide ongoing support, and perform maintenance upgrades.

Obviously, things have changed quite a bit: [Technology has progressed](#) and firms that are evaluating cloud-based programs don't necessarily need someone to download their data and upload it to new software on a new server. The primary reason for this is that these days the technology vendors will do all of that leg work for you.

Over the course of the last several years, we have seen firms work directly with the practice management vendor and we have seen firms utilize practice management consultants. It is not our intention to lead you one way or another, but rather to give you an overview of what both scenarios could look like. Ultimately, you will have to make the best decision for your firm and choose a direction that best aligns with your goals and processes.

## Evaluation Process

As we discussed in, [How to Begin Evaluating New Technology](#), when you're beginning to evaluate different programs, the first step is understanding your firm's needs. The first thing a consultant is going to do is come in and interview you and your firm. They're probably going to be familiar with the program you are currently using so they're going to understand your technical needs. Based on the conversations they have with you and your staff, they'll gain an understanding of your firm's process needs. Finally, they'll make recommendations based on all the information they have collected.

So, if you don't feel comfortable speaking directly with a vendor about what you need or discussing with your staff what they need – or you feel like you lack the technical knowledge to make those judgment calls – we recommend bringing a consultant into the fold.

## Juggling Multiple Systems

Consultants today typically work with multiple systems. This can be both a good and bad thing.

The good thing is that their experience with multiple systems can prime them to bring multiple options to the table for you, providing the pros and cons of each of the recommended services.

However, if a consultant works with multiple systems, they're probably not an expert in any single one. So if you're evaluating multiple programs and end up going with a specific one, your consultant will not necessarily be an expert in that chosen system. What this means is that they will have the foundational knowledge to initiate the basic setup for you but may lack the granular details to help you flourish and excel. In this scenario, working directly with the vendor is going to be more advantageous because the vendor will know more about its own program and be better equipped to help you overcome any issues you may encounter.

## Price

Vendors and consultants operate under two very different business models. The vendor is a software company and the consultant is a service company. Software companies view services as a means to get you to use their software and to make you successful on their program so that you stay with them. Service companies sell services as a way to make money.

Typically, working with a consultant is going to be more expensive than going directly to the vendor. The right consultant will offer a lot of value, but some firms just don't need those services.

What we have seen happen after some firms opt to work with a consultant is that the perceived value of what they thought they were going to get was way higher than it should have been, thus setting themselves up to be unhappy once they go live. Other times, we have seen firms who were grateful they chose to work with a consultant because they were able to get reluctant staff on board with the technology change with as little friction as possible.

Think about whether or not it makes sense for your firm to hire a consultant in order to get from point A to point B. If your main concern is cost and keeping expenses as low as possible, you may want to skip the middleman and think about working directly with a vendor. And if your firm has a complex situation and growth trajectory is pointing to a need for more robust features, reports, and capabilities, working directly with a vendor may be the most prudent choice because the vendor will have the insight into how to guide you through that process properly.

Another thing to consider is that consultants tend to come from smaller organizations. The benefit to that is you will develop a close working relationship with your consultant and you will have the opportunity to get to know them and, conversely, they will have the opportunity to get to know you and your firm on a deep level. In most cases, you are assigned one personal consultant, which is conducive to an intimate working relationship. The downside of this is that while they may be a personal consultant to your firm, your firm is probably not the only firm they are supporting. In other words, if you need to get in touch with them, you could be waiting based on their availability.

## The Takeaway

Most software vendors today are set up for you to work directly with them throughout your migration, go-live, training, and support periods; however, they will also accommodate your firm if you choose to work with a practice management consultant. It is up to you and what you think will not only best fit your firm but your firm's future needs as well.

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