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How to Begin Evaluating New Technology

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Many firms, upon deciding it's time to evaluate new technology, make the mistake of immediately sprinting toward a solution, especially when they have been forced into addressing a sudden problem.

They dive headfirst into the search for new practice management software and completely forget a huge step – arguably the most important step: meeting with the people who are going to use it the most.



Meet with Your Team Internally

As soon as you realize your practice needs new technology, the first thing you need to do is take the discussion internal. Too often, the decision to buy software is made by a handful of people within the organization, which makes firm-wide adoption more challenging. It leads to greater conflict and pushback, and makes training on the new system considerably harder. Without team buy-in, implementation of new technology could even make the team's job harder.

You might be wondering how introducing new technology could make your team's job harder. Let's go over some examples:

- **Calendaring** – Some programs make entering related deadlines, and deadlines in general, very laborious. Not every system is set up the same way. Some require more manual leg work, while

others make the process more automatic. If you make the executive decision to go with a program that contradicts the way your staff uses this feature, you will not only be making their day-to-day harder, but you'll also be leaving room for mistakes to be made.

- **Old-School Sentiment** – Let's face it: Some people are just set in their ways and will push back on adopting new technology, period. If you have staff who have been using one system or are used to one method for completing their work, they may be way more reluctant to switch to a completely new way of doing things.
- **A Lack of Practice-Area-Specific Features** – Don't get fooled into investing in software that gives you cookie-cutter capabilities. If, for instance, you need to track medical records or doctors' bills, you need software that is able to do that. Make sure you hone in on what your staff needs because a lot of off-the-shelf software aims for a one-size-fits-all approach and won't have the features your team needs to do their jobs efficiently and effectively.

The takeaway here: Don't call an audible and buy software on your own without speaking to the people who have the most skin in the game!

How to Meet with Your Team

If you'll be the one organizing and collecting all of this internal data, start by putting out some feelers to people in order to get a grasp on the politics of your firm. Plant the seeds to gauge how they would feel about adopting new software. It will be more helpful than you think to know exactly what people's gut reactions were prior to processing any feedback.

When you do reach out to speak with your team formally, lead off with the following two steps to get the best results:

1. Send your team an email saying you're shopping for new software. Within the email, make it clear that you are looking for internal feedback.
2. Set in-person meetings to discuss their feedback and thoughts.

Conducting the actual discussions in person as opposed to over email encourages open dialogue and ensures your team feels like part of the process.

If you're a small team, you may talk to everyone in the firm; if you're a midsize firm, you want to speak with at least one person from every department. On the administrative side, it is advisable to speak with everyone regardless of firm size because they will be such heavy users of the software. Consider speaking to:

- Partners
- Associates
- Paralegals
- Legal Assistants

Additionally, you want to speak directly with both the more technology-adept team members and those who don't love using technology. If you don't diversify your sample, you will end up with vastly different responses and reactions when it comes time to go live.

Avoid asking leading questions when you do speak with the team. Don't come into this with an agenda. Ask open-ended questions that allow your staff to freely express their raw opinions and thoughts. The best software you can buy is the one that your staff will like and actually use.

Categorize Your Feedback

Once you have spoken to everyone you need to, compile a list of all the feedback you received and categorize it into buckets. These buckets can be whatever you want, but if you need a kickstart, use [Billing](#), [Accounting](#), and [Practice Management](#) as a guide. From there, you could break each category down further. Consider the following breakdowns:

Billing:

- Timekeeping
- Client Billing Requirements
- Process Requirements Accounting:

Accounting:

- Accounts Payable
- Reporting Requirements
- Production and Origination

Practice Management:

- Calendaring
- Document Management
- Case Information Tracking

In the end, you want to create your own categories based on what your staff is telling you they need.

Addressing Concerns

Oftentimes, the two parties that push back the most when presented with new software are the Billing team, who don't want to change their processes, and the Shareholders, who may not feel the expense is justified.

To address Finance concerns, the first thing you should do is ask them to identify any major pain points or complaints they foresee with moving to a new system. Listen to them, make sure they feel heard, and point out the key benefits and shortcuts that the new system offers. In most cases, the initial change is the biggest hurdle to get past. If you can get them excited about the long-term benefits of the technology and emphasize that the road to get there isn't as cumbersome as it sounds, you'll be more likely to get them on board

For the Shareholders, it's all about the value proposition – show them the money! Highlight some of the ways that new technology stands to make your firm money, both in the long and short term: It will enable you to capture more billable hours, increase client satisfaction and referral rates, and attract top talent for a long-term competitive advantage.

The Takeaway

It is easy to jump into a process you're excited about, but there are many intricacies and considerations that go into buying new legal software. Rushing this process can result in either miscommunication, wrong expectations, and an unhappy team. Take your time and do your internal due diligence before you start knocking on vendor's doors.

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