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How to Create a Legal Practice Management Software Training Program

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Your firm is making an investment in new legal practice management and billing software in order to achieve some desired financial and procedural improvements. And maybe you personally stuck your neck out and bet your career on this new software. There is no better way to facilitate a successful implementation than properly training your staff. In my experience, most law firms view training in one of two ways; the law firm sees training as an investment in their staff and the success of the implementation, or the firm views training as nonessential and just another way the software company tries to get an extra buck out of them.

Let me set things straight – training is a GREAT investment for your firm because you'll learn to use the software correctly. Besides, if your staff doesn't fully understand how to use the software, how can they take advantage of all the great benefits it brings to the table?

Here are a few tips on setting up your legal practice management and billing software training program:

1. Segment Your Staff by Job Function and Technical Aptitude

When you're deciding how to train your staff, take a few things into account:

First, consider their job functions in the firm, because based on their jobs, they will need to learn different features. For instance, it doesn't make sense to train a partner to enter payments into the program (unless it's a very hands-on partner or you're a really small firm) because the billing and accounting team will take care of the finances. But, it does make sense to train the partners to enter time into the system, which your billing and accounting staff won't need to know.

At Centerbase, we typically break it down and do separate training sessions for attorneys, paralegals/assistants, billing staff, and accounting.

Second, consider each person's technical aptitude. This is important because if someone catches onto the software quickly, they'll lose focus if you're having to stop the training session to help those who aren't grasping it as fast.

If you can, divide the training sessions by job function and then technical aptitude, especially for larger groups like attorneys and paralegals. Since the attorneys' and paralegals' jobs are to interface with clients all day, they tend to become quickly distracted if they're not being engaged with useful information.

2. Train a group of super users first

Super users will be your "boots on the ground" once the software company finishes implementation. Typically, the firm will save time and money by having someone in-house who staff can go to for basic 'how to' and troubleshooting questions.

If possible, I recommend doing super user training before the basic training. It is helpful to have a few extra people in the room who understand the software to help the general staff during their first training sessions (especially if the training is web-based).

3. Begin with the basics

Don't overwhelm your staff with everything the software can do at once. At first, show your staff how to do things they could do in your previous software and/or a few of the basic new features such as navigating around a matter, using the calendar, etc. to get started.

If you're also billing out of your practice management software, your billing/accounting team will have to dive right into using everything in the financial modules from the start.

For billing, I recommend requesting initial training to familiarize yourself with billing out of the software, and then request additional training for your first round of bills. Basically, during the second billing training session, you'll have the trainer walk you through your first round of bills. This is very important as you don't want to affect cashflow at the firm (that's the quickest way to have a senior partner boot your new software right out of the firm).

Another good idea is to begin your rollout right after you send final bills out for a given month, so you have the most time possible before the next round of billing.

4. Offer a second training no more than 10 business days after the rollout

Once your staff begins using the new practice management software, they'll generally have a list of questions or suggestions for modification (such as how the matter layout looks). To keep morale and adoption high, offer a second training session within 10 business days of your initial training. During this session, you can demonstrate additional functionality within the program as well as revisit what was taught during the first training session to tie up any loose ends.

10 business days can be a long time before you have a refresher on the software. Before the first and second training, I would recommend having a super user check-in with all staff members to see how they're doing.

5. Continue quarterly training courses

For at least the first year, I would recommend offering quarterly training sessions on the software. If you roll out the program the way I've described in my article 4 Tips on How to Begin Using

Practice Management Software at a Law Firm, you'll have additional features to show them on a quarterly basis (also, most vendors offer monthly or quarterly new releases, so it's inevitable that you'll have new features to show your staff). Also, this is a good chance to boost the morale of those who are struggling with the change.

I hope this article was helpful – feel free to reach out if you have any additional questions on creating a legal practice management software training program.

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