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How to Pitch New Legal Practice Management Software to Your Management Committee

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If you've ever braved the cold winter in Chicago to attend the ABA TECHSHOW or if you plan to attend in the future, you'll quickly notice that over half the vendors tout themselves as 'Practice Management Software.' But, as hot as the practice management space is in legal tech, less than 60% of small-to-midsize law firms actually have practice management software. The vast majority of firms primarily still rely on their billing software to store client information, Outlook to archive emails/calendar/store contact information, and a folder on their firm's 'x drive' to manage all case documents.

Change can be hard, that's not a new fact. But what could be even harder is getting partner buy-in to pursue and adopt that change. Over the years, we have compiled some tips and tricks on how our clients have successfully pitched purchasing practice management software to their law firms. We found that the firms who have adopted new technology look for the best ways, venues, and times to voice their ideas and concerns—using rhetorical skill, driven data, and interpersonal connections to move the right leaders to action. These internal change-drivers are seen to employ specific tactics significantly more often than individuals who don't succeed in gaining firm buy-in.

Evaluate Your Current State

Before you even begin thinking about shopping for software, you need to clearly understand the pain points your firm is experiencing. Are you having a hard time managing your matters? Do you have a slower intake process? Poor internal and external communication channels? Identifying your weaknesses and [eliminating waste](#) should be your first step. Take time to do your research. Speak with multiple people from different departments, different positions, and different tenures at the firm. Try to be open-minded and listen to all the issues your staff is having, even if they don't directly affect the decision to purchase new software. The more pain points you can find, the more open ears you'll have in the room eager to hear a new solution.

Involve Others

Building a task force generates organizational buy-in more quickly and on a larger scale as more people contribute energy and resources. Negotiation experts would tell you to mobilize your allies, persuade your blockers to support the software or at least back-off, and show the fence-sitters why they should care about what you're presenting.

If you are a small firm, it might only be one or two people, but having a few people on your side is always helpful. Creating a task force also offers you multiple perspectives when you are meeting with software vendors.

Frame the Issue

A problem's place on your firm's list of priorities depends heavily on how you package the idea. A new software might seem like techie trivia until you explain how it supports a strategic goal. For example, if your team is losing notable time manually sending out bills, legal software can completely eliminate that wasted time by allowing you to email bills out to your clients in one click. Now, that problem is a priority to solve. Once people in your firm see how your initiative fits into the big picture, they'll be more willing to devote resources to it.

Similarly, if you're a firm administrator presenting a use case to your partners on the benefits of financial reporting software, you can describe how transitioning to the new software will enable you to quickly generate the reports they need. It will allow you to understand what receivables are due to be collected, pinpoint who the high revenue clients are, quickly build general ledger budgets to identify trends, timekeeper budgets to hit more targets, and matter budgets to keep clients satisfied. By highlighting specifically what would be gained from the software, you create a sense of urgency for partners.

Although focusing on business benefits is often safer, also consider presenting the software as an opportunity that shouldn't be missed. Present what your firm stands to gain from your ideas and emphasize the positives. This will work to inspire optimism and buy-in. Additionally, highlighting a threat—a consequence of not adopting your idea—can also create pressure to act. But take note that it can also backfire: The person who created or currently implements the method of operation may be sensitive to your critiques and proposal for change. It may be hard to predict whether it will spur action—the classic “fight” response—or result in “flight.”

Manage Emotions on Both Sides

Because selling your firm on a new software is an interpersonal activity, often involving financial and cultural change, it will inevitably stir up some emotions. Passion, if appropriately expressed,

will improve your chances of gaining attention and triggering action. There's a fine line, however, between passion and anger. You may be proposing a new cloud software because your hard drives are simply not cutting it, or you're just fed up with existing inefficiencies. And as you encounter roadblocks to your selling efforts, your frustrations may intensify.

Though strong emotions can be channeled into a rousing appeal for action, when unregulated, they're more likely to diminish your influence. Unfortunately, managing partners who detect negative emotions from associates offering input may tend to perceive those employees as complainers, not as change agents.

Time the Pitch Appropriately

It's critical to find the right moment to pitch the new software. That moment might be when organizational priorities shift, when certain players leave or join the firm, or when a partner's preoccupations change. Take notice of when more and more people are beginning to care about a larger topic or trend that's related to the issue they face. For example, if you notice that your attorneys are becoming increasingly annoyed with having to repeatedly print pre-bills to make corrections, that could be a good time to bring up features like [electronic pre-bill approval](#) that will help streamline your billing process and improve cash flow.

In addition to keeping a close eye on larger trends and events, it's important to be mindful of deadlines and initiatives too. If your firm is looking to improve its [client intake](#) process and focus on client conversion rates by a certain time, then that would be an optimal moment to highlight the benefits of a software that includes custom contact forms, automated intake processes, and comprehensive conflict checks. Conversely, when a deadline is far away and partners are still in exploration mode, open-ended inquiry can be more effective than proposing a specific solution.

Gear Your Pitch to the People in the Room

Tailor your findings to the people who you're pitching to. At the end of the day, everyone's end goal at the firm should be the same, but every team has their own day-to-day objectives and priorities. For example, a partner is most likely concerned with growing top-line revenue, while a paralegal may be more wrapped up in client and matter onboarding. If you're pitching a new software to your firm's managing partners, frame the obstacles in a context that would most pique their interest. If you know they are worried about ensuring costs get billed back to clients, bring up features where integrated credit card feeds and account payable modules are available to make it easier to bill expenses back to clients as they're being entered. Or if you know management's top priority is automating non-billable activities, show them workflow engines that make it easy to automate non-billable, administrative work such as sending follow-up emails, updating client

information, or calendaring tasks. You will have greater success if you familiarize yourself with your audience's unique blend of goals, values, and knowledge and to allow that insight to shape your pitch.

The Take-Aways

There are many types of legal software to choose from. Evaluating where your firm is will be critical in not only selecting one, but then proving to your management team why the firm needs it. Your pitch will fall flat if you can't articulate what is needed and what is not. Locate your pain points, assemble a task force, and identify the right time and emotional setting to present your findings and solutions to your partners.

There are no set prescriptions that can capture the nuances of every environment or remove the risks and potential difficulties of pitching a software. If you can give actual ROI numbers, you have a better chance of selling partners that aren't totally sold. Bring literature from the practice management software providers you've chosen, include pricing quotes, and have some success stories in your back pocket. Arming yourself with as much information as possible will greatly assist you in selling the adoption of the software you want.

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