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Should Your Law Firm Work With a Software Consultant?

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To understand the full history of legal industry practice management consultants, you'd have to go back 30+ years. Back then, all programs were server-based (not [cloud-based](#)) so law firms needed someone with enough technical expertise to understand how to load new programs onto their servers, install all the updates when they rolled out each year, deploy those updates to the firm servers, train and teach staff how to use the software, and ensure everything functioned and was maintained properly.

Obviously, things have changed quite a bit. Technology has progressed and law 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. Why? These days, the technology vendors will do all that leg work for you.

Over the course of the last several years, we have seen firms work directly with practice management software vendors and we have seen firms utilize practice management consultants. We're not here to lead you one way or another, but rather to give you an overview of what both scenarios could look like.

Evaluation Process

When it comes to evaluating different programs, the first step is always going to be [evaluating your firm's needs](#).

The first thing a consultant is going to do is come in and interview you and your firm to understand your technical needs. They'll probably be familiar with the program you're already using as they begin their process. After conversing with your stakeholders, they'll make a recommendation based on the information they collect.

If you've ever felt uncomfortable speaking directly with a vendor about what you need, or if you feel like you lack the technical expertise to make those judgment calls, we recommend bringing a consultant into the conversation.

Juggling Multiple Systems

Today's consultants typically work with multiple systems. This can be both a good and bad thing.

The good thing? Their experience with multiple systems can prepare them to bring multiple options to the table for your firm, 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 software systems 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 likely 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 chosen software vendor specifically for implementation will be more advantageous because the vendor knows more about its own program, and will be better equipped to help you overcome any issues you may encounter.

Cost

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 ensure your success with their program so you remain a happy and loyal customer. 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 don't need those services. 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.

Conclusion

Most software vendors today are set up for you to work directly with their team throughout your migration, go-live, training, and ongoing support period; however, they will also accommodate your firm if you choose to work with a practice management consultant.

Ultimately, the decision is up to you and what you think will not only best fit your firm today but your firm's future needs as well.

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