

What You Must Know Before Investing in Practice Management Technology

A guide to choosing the right software, vendor and consultant.

Executive Summary:

The simple fact that you are considering a practice management program means that your firm has reached a pain point that makes work difficult on a regular basis – matter-related contacts, emails, notes, documents, etc. are scattered among various software programs and computers; attorneys must “re-create the wheel” when they can’t find a particular document so productivity suffers; billable hours are lost when they aren’t captured real-time. Inefficiencies like these cost you a bundle in client service and profitability every day.

There are many excellent practice management programs out there. Here’s what you need to consider before investing in one of them:

Your Firm’s Commitment

A firm that is not committed to this process might:

- never take the product out of the box
- not allow time for the staff to learn how to use it
- buy it once expecting there will never be a need to spend another dime on it

A firm whose leadership understands the importance of this investment will:

- expect to have ongoing investment in the software
- provide comprehensive and ongoing training for its staff and principals
- hire a competent consultant whom they consider a partner in their success

The Total Cost of Ownership

The initial cost of the program is only the beginning. The sooner you realize it, the more success you’ll have with the software, the happier you’ll be as an end-user, and the greater the rewards you will experience. And, those rewards (greater productivity, revenue and profitability) are what matter most. It’s why you invested in it. So, in addition to the license fees, include the following expense items in your budget:

- training time
- training costs from the vendor or consultant
- installation
- ongoing support
- regular upgrades
- customization costs

- retraining (if you have a high turnover in certain positions)

Budget for the above each year, spend it each year, and you will realize the growth, profitability, and success that you envision.

Your Data Conversion Requirements and Expected Results

Having answers to these questions will prepare you for a successful conversion.

- What data must be converted to your new practice management program?
- What are the data exporting capabilities of the existing programs?
- In what format must the exported data be in for the new program to import it?
- Is there a portion of the data that will not be importable?
- Does the formatting change when it is imported?
- Would it be better to do merely “data entry” versus converting what may result in incomplete data?
- Do you need a consultant or can you do it yourself?
- Should you do a “dry run” to test the conversion?
- What vendor help is available?

Integration with Other Software at Your Firm

While it is common for some software to integrate seamlessly with other popular programs, there is no guarantee that a package you are considering will integrate with the programs you currently use. Talk with a consultant who implements the software for a living (not your IT guy), and talk to the vendor specifically about whether and how the program integrates with your existing software.

Who Is Going to Use It?

Make a list of the personnel who will use the practice management software. Is each person likely or unlikely to adopt the new system willingly? Do you anticipate challenges from any of your attorneys or staff who is technophobic? This is an important consideration and you will need an effective training strategy to ensure full participation from all those involved.

Who Will Provide the Support?

Some firms are content with a vendor-supplied support solution, though it may cost more and be delivered from an off-shore representative. Many firms desire a more local, personal approach and find it via a third-party, certified consultant. Ask the vendor about its support offerings before making your purchase. And, call a consultant for specifics about its support services and the related costs. Choose your preferred method of support and sign up when you make your purchase. This is not something to delay until you need it.

What about Training?

Training is usually a requirement. It's unreasonable to expect the staff to learn it on their own while also performing their regular duties. If training isn't formally organized, it won't happen. There just isn't enough time in the day.

Training is one of those expense items you budgeted for anyway, right? To ensure you get the most out of your software investment start by listing all the objectives you'd like to achieve with the software. Then work with your consultant to match the training to the objectives. Prioritize the list and work on no more than three features of the product until the firm has comfortably worked them into their daily jobs. At predetermined intervals, schedule the next set of 3 training topics. In six to twelve months you'll be amazed at your organization, the productivity and resulting successes. You will even wonder how you ever functioned without the new system.

What Reports Will You Need from It?

Looking ahead to what reporting capabilities are available BEFORE you purchase software forces you to examine why you are purchasing it in the first place. Based on your objectives, you may want reports on work-in-progress, billable hours by name, or new client acquisitions by attorney. Armed with your objectives you'll make a better judgment of a program's reporting capabilities.

What hardware does the new practice management program require?

Maybe the hardware you have now is fine, maybe not. You need to know this to implement any new system. Some upgrading of your hardware may be necessary for the software to run well or even to be supported by the vendor. Check the following specs and compare to the software requirements:

- server
- workstation hardware
- wireless connections
- remote capability requirements

Talk with other users of the software you're considering and to a consultant for optimal hardware configurations. Invest the dollars to exceed the vendor's specifications and you will be happier with the performance in the long run. Especially, increase RAM and network speed for database applications.

Will You Need To Hire a Consultant? If so, what type?

A competent consultant will be a partner in the firm's success. The firm will use the consultant's services and pay their bills with a smile because the management knows that each dollar invested properly with a consultant for training and support will reap at least three dollars in productivity and revenue to the firm.



A Certified Independent Consultant will first analyze the needs of your firm and only then present you with practice management software suggestions based on that analysis.

The Next Step: A Free Efficiency Evaluation

This information is provided by The ProfitPoint Group, a Rhode Island-based consulting firm providing software, installation, training and technical support for legal professionals. Contact The ProfitPoint Group for a free efficiency evaluation of your law firm to determine how practice management technology can help you improve profitability.

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About The ProfitPoint Group

The ProfitPoint Group, Inc. simplifies the complex process of selecting and implementing practice management and billing systems for small- to medium-sized law firms. As a HotDocs consultant and Certified Independent Consultant for PCLaw®, Amicus Attorney®, Timeslips®, Time Matters®, and Billing Matters™ software, we are able to recommend the best product to suit your needs. After implementation, we fully support these systems with customized staff training and seamless tech support. Our proven approach directly increases client profitability while reducing your time spent managing the practice. Tom Busch established PPG in 1985. Since then our singular focus remains on giving very personalized attention to each of our clients in the time-critical and information-intensive practice of law. For more information and resources visit www.theprofitpointgroup.com.

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