KEY FACTORS TO CONSIDER WHEN CHOOSING A PRACTICE MANAGEMENT SYSTEM

INTRODUCTION

The legal profession has changed a great deal in recent years. Increasing client demands, globalization, and greater IT complexity have all affected firm profitability. The requirement to have a comprehensive, agile, and user-friendly financial and practice management system to manage operations and support key decision making has now moved beyond a functional need to a strategic requirement. Therefore, choosing the right system demands much more than comparing software functionality.

Law firm leaders certainly do need a comprehensive software solution that meets their needs, but they also need much more than that to ensure their success for many years to come. These additional key factors include:

• Proven implementation and conversion success, as well as best practices experience
• Top-notch, reliable client support
• Product development methodology that includes extensive client-vendor partnering and collaboration
• Technology framework that protects firms from future changes and costs
• Community of peers for networking and ongoing learning
• Solid company dedicated to the legal industry and to client satisfaction
PROFESSIONAL IMPLEMENTATION STRATEGY PRODUCES SUCCESSFUL DATA MIGRATION WITHOUT DISRUPTION

Successful IT implementations enable transformation. They are complex, require high investment, and result in far reaching organizational impact. A firm should make a serious, conscious decision to switch to a new practice management system and choose a partner to help lead the changes that accompany that switch. Until the solution is live, a firm cannot benefit from using a practice management system. The implementation is crucial to the overall solution.

When a firm makes a product selection, it usually considers product features and functions, flexibility to customize, and technology. Firms sometimes overlook the importance of the implementation journey to go live on the new solution.

Focusing on the End Goal

One of the first critical steps in implementing a new practice management system is defining the goals of the implementation. Your firm may want to introduce a few new operational procedures, or you may want to use the IT implementation as a catalyst for cultural transformation. Regardless of the size of the project, firms should consider the following guiding principles:

- Publish and communicate the firm’s goals and objectives widely and frequently
- Ensure that all stakeholders understand and buy in to goals
- Define measurable success criteria
- Identify the cultural impact that the new system may have on the organization and develop mitigation plans to address as early in the implementation as possible
- Build the “right” team that consists of both vendor and firm staff and project managers on both sides
- Establish clear lines of ownership through defined roles and responsibilities to ensure strong project execution and accountability
- Develop a joint project communication plan that clarifies expectations regarding project status reporting, escalation protocol, and governance
- Scope each phase of the implementation, tackling critical activities first
- Create a detailed project plan with an agreed upon timeline and milestones
- Implement a formal risk and issue management process
- Develop a robust testing strategy and change control process that can be validated during the implementation user acceptance testing phase

“A well-planned, well-executed implementation minimizes disruption and avoids negative consequences.”

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• Map workflows and consider best practices for processes and use of the system

• Create a holistic roll out plan to ensure organizational readiness to include go-live transition steps, firm-wide communication strategy, and end-user training

With a well-defined implementation plan in place, the team can ensure that the project stays on track, accomplishes all of the firm’s objectives, and identifies and mitigates any risk factors as they arise.

**Managing Risk**

Project teams identify potential risks early and often and put plans in place to proactively address them. Successful implementations have strong risk management processes that are:

• Dynamic, iterative, and responsive to change

• Capable of continual improvement and enhancement

• Continually or periodically re-assessed

• Based on the best available information

• Inclusive

The consequences of failing to implement a new practice management system in a timely manner are:

• Inaccurate or late billing

• Immediate impact to the firm’s cash flow

• Lack of compliance with mandated standards

• Incomplete information that could cause misrepresentation of clients and result in malpractice claims

**Guiding the Way**

A well-planned, well-executed implementation minimizes disruption and avoids negative consequences. If you are like most law firms, your team has not implemented a new practice management system in many years. Selecting a partner with experience is important to your success. Aderant partners with our clients to deliver consistent results.

• The Aderant professional services teams have implemented practice management systems hundreds of times at firms like yours

• Our services professionals have an average tenure of ten years or more, many coming to Aderant with hands-on experience from within the legal industry
• Associates have extensive knowledge and deep understanding of the challenges a law firm will face when they take on a system conversion

• Aderant has leveraged this collective knowledge to develop best practices for all types of firms

• Aderant will guide you every step of the way and help you to stay on track, meet your objectives, and get your system up and running on time and within budget

Training for Success

Aderant delivers the best possible training to maximize platform utilization and user satisfaction.

• Certified trainers deliver hands-on-learning classes on-site or at an Aderant facility

• Aderant Academy offers more than 80 free online training courses

• The Support Knowledge Base provides thousands of searchable articles and how-to guides, all presented online in a user-friendly format

Continuing to Improve

At Aderant, we credit our success to:

• Our “Speed to Value” philosophy

• An airtight methodology

• Deep commitment to refinement and continual improvement of each step in the implementation process

• Guiding principles to make implementation more efficient, predictable, automated, and repeatable

• A focus on our client’s goals – to get firms up and running quickly

On-time, on-budget implementations mean you can start realizing the value of your new system sooner. The implementation timeline should allow time for planning and consider the impact to the business and minimize disruption. Aderant partners with our clients to make this implementation journey safer and easier.
RESPONSIVE, KNOWLEDGEABLE PRODUCT SUPPORT KEEPS YOUR FIRM UP AND RUNNING

Your practice management system is the critical backbone of your firm and needs to be up and running at all times. Whether you have a boutique firm with a single office or an Am Law 100 firm with multiple offices around the globe, you need assurance that if a problem arises, you have access to a support team that will always be there with a solution. Technical issues or unexpected disruptions can cost dearly in lost billable time, poor client service, staff overtime, and more. Aderant understands the critical importance of product and technical support. We have developed a comprehensive global product support infrastructure, including a network of support centers in North America, the United Kingdom, and Australia that provides our regional and global clients with local access to qualified, knowledgeable, and experienced support professionals.

This dedication to customer service has enabled Aderant to earn some of the highest customer satisfaction ratings in the industry. According to independent surveys, nearly 95 percent of firms were highly satisfied with their most recent experience with Aderant’s support organization.

Support representatives have an average of eight years of experience with the Aderant Expert system. As part of best practices for support, all logged cases are categorized into four levels of severity depending on client impact with specific resolution and escalation procedures.

In addition, Aderant makes available a client support portal where each issue can be tracked and monitored at all times. The target response time for all cases is 15 minutes, which is achieved 93 percent of the time. 74 percent of cases are resolved within 24 hours.

Aderant also offers a unique resource at no charge to clients to ensure that firms continue to realize all the value of their practice management system year after year. Regional solution consultants visit firms periodically to offer further support to clients by sharing best practices, answering questions, and providing insights that enable you to leverage all of the capabilities of the system to better meet firm goals.

CLIENT COLLABORATION IN DEVELOPMENT PROCESS CREATES A BETTER END USER EXPERIENCE

Most vendors allow engineers and software developers to operate in a vacuum, creating products that they think are cool but are not designed for real users. Even worse, in a large number of high tech software companies engineers make all of the decisions about product functionality and design. This sadly common process results in products that don’t perform as clients need or expect and create a bad user experience. Even if the functionality exists, the product is complex and difficult to use, resulting in low adoption rates. This forces the development team to spend countless weeks or months, sometimes years, making changes
to meet the true user requirements. Product delays and fixes can be extremely costly to the waiting customer. This hidden cost is never discussed or evaluated during the buying process. But there is a better way that consumer companies have been leveraging for many years – working with target clients before products are even begun to determine exactly what business process they’re solving, what functionality is required, and what the optimal design needs to be to maximize adoption and usability.

Aderant directly addressed this issue in 2007 by assembling a human factors team within the Product Management organization to collaborate with clients on new products before any code is written. This team cannot write code and is not familiar with the inner workings of law firms, but they are experts on how humans interact with computers. They understand how much information is too much, how many clicks it should take to accomplish a task, where the eye goes on the screen, and other factors that impact product usability.

Aderant product managers and business analysts, on the other hand, are experts at the inner workings of law firms and spend a great deal of time in law firms. When Aderant decides to build a product, they look for clients that are experiencing challenges that this new product would solve. Typically firms are chosen in EMEA, North America, and APA. These firms agree to give Aderant unlimited access to the individuals who would be the actual users of the new product. The product manager, business analyst, and human factors engineer travel to each of these firms, become intimately familiar with the particular business process, and actually model it in great detail. Then the firms come together to from a consensus of the best practice “business process” that should be modeled in the new product to meet their detailed requirements.

The next stage is crucial. The product manager, business analyst, and human factors engineer work together to build a complete set of wireframes representing the proposed product. Every aspect of the product is modeled including all screens, buttons, and text boxes. The team then visits the same clients and the clients mark up the wireframes with their suggested changes. This is where the visual representation of the application is extremely powerful. There are typically significant modifications during this phase. These markups are collected and then a “best practice” product is modeled. Once this has been completed, the human factors team “skins” the application applying the Aderant look and feel including all buttons, icons, and other interface components. This has one final pass with the clients, and then it is handed off to engineering to build.

Because the developers now have a detailed blueprint for the application, the production phase is much shorter and firms can start using these new products to meet their needs in just a few months. Engineers do what engineers are good at – writing code instead of developing user interfaces. And those products are extremely robust and elegantly designed, making them easy to deploy, learn, and use. Firms can start leveraging the power of these new capabilities much more quickly, which could give them a competitive advantage in the market. At Aderant, new modules that might have taken 18 months to develop in the past...
now take just four to six months from starting the product to client delivery. For example, Aderant was very quick to market with tools such as Expert Matter Planning and Found Time. This enabled law firms to respond more quickly to client and market demands with easy-to-use solutions that met their needs out of the box and are very robust.

EASIER TO MANAGE MODERN TECHNOLOGY PROVIDES MORE CONTROL

Technology is always evolving and changing. New standards emerge and make older products obsolete. The pace of change is escalating, but law firms often struggle to absorb all of these changes. Complex software products such as practice and financial management systems touch every aspect of the firm, and changing that system is not taken lightly. Everyone might agree that leveraging the latest technology could yield substantial benefits for the firm, but the time and effort to move to that technology can be quite painful. However, there is another way. Because of advances in product design, it is now possible to build end-user products on an adaptable technology framework, in which layers can be swapped out when new innovations come along with no impact to the end user – except that they are suddenly able to do more!

The Aderant Framework was created to ensure users receive a robust and scalable solution to support the management and growth of today’s increasingly complex law firms. Think of it as a building foundation that contains all the plumbing, wiring, and mechanics on which we build our applications. We built our Framework in a most unique way that allows us to keep up with ever changing technology. Imagine the ability to update all the wiring in your building without having to tear into the walls. This is similar to how the Aderant Framework was constructed. We can make technology updates to our Framework, and all of our applications immediately have access to whatever new functionality this technology brings.

The goals of this Framework are to better support both our business and yours by:

- Enabling rapid development and rich customization
- Delivering more robust solutions
- Seamlessly scaling to meet business demands
- Enabling easy integration between other key systems
- Supporting easy software distribution to users and central systems
- Automating business processes both efficiently and flexibly
- Reducing reliance on third-party software
- Maximizing professional and system efficiency for highly distributed organizations
- Utilizing standards based on off-the-shelf technologies
We have architected the Aderant Framework so that it lasts and stays current for as long as possible. That means our clients are not forced to go through major upgrades to modernize their system. Aderant has constructed a layered framework with well-defined boundaries between the layers. If a new technology becomes available or replaces a current technology, then we simply swap out the layer that contains the outdated technology, with little or no impact on the rest of the system. We believe this architecture will easily achieve a lifespan of 20 years or more. And perhaps the most compelling benefit is that clients never have to pay for upgrades.

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A GLOBAL COMMUNITY OF USERS LOWERS COSTS, IMPROVES EFFICIENCY, AND FACILITATES INDUSTRY RELATIONSHIPS

Your peers around the corner, down the street, in another city, or even in another country may hold the key to helping you through a particularly gnarly challenge or taking advantage of a spectacular opportunity. Creating and maintaining networks takes a lot of care and feeding, but Aderant clients have a head start. Active regional user groups hold regular meetings, global user conferences bring people together each year, and the independent Aderant Expert User Community provides a host of benefits for member firms. Leveraging your community can provide just the support you need to accomplish one of your key objectives, help you figure how to do something tricky in the software, or just give you an outlet for vetting ideas with other smart people. A community is an invaluable resource and Aderant fully supports getting clients and other industry professionals together regularly for the mutual benefit of all.

Regional user group meetings are held throughout the year in many cities across the US, EMEA, and APA. These meetings are usually hosted by our clients at their firm, and they bring together Aderant clients in the area to discuss industry trends, software topics, Aderant corporate updates and product releases, best practices, and tips and tricks. Clients often present topics and lead roundtable discussions.

The community of Aderant users meets annually at the global Momentum user conference, which is a two and a half day event that covers a wide array of educational topics over 12 tracks and more than 160 sessions. Regional user conferences are also held annually in London and Sydney. Year after year, clients remark that the networking that they can do at Momentum is one of the top benefits of attending.

In addition, Aderant clients have a direct impact on the future of our products. Both Momentum and regional user group meetings provide a great space for product roundtable discussions. As Aderant is considering new product features, we often bring together current users and experts to discuss a particular business problem and how our software can be shaped into a solution. Since the experts invited to these roundtables have specific expertise in the problem at hand, their professional opinions, along with users’ input, help Aderant strategize to develop an innovative and practical solution.
ADERANT’S FOCUS ON LEGAL INDUSTRY CREATES HIGH CLIENT SATISFACTION

Our clients demand flexible, solid systems from forward-thinking partners. Our commitment to client satisfaction has created a focused, driven organization with a reputation for quality, innovation, and service. For more than three decades we have been working with clients to develop solutions that meet today’s dynamic requirements as well as tomorrow’s strategic vision.

Since 1978, we have helped thousands of firms, both large and small, smoothly transition to a system that meets their needs today and in the future. With more than 35 years of experience delivering implementations on time and on budget, Aderant has built a reputation as a leader in both implementation success rate and client satisfaction. Our services and support teams boast the industry leading metrics to back it up: 95+ percent customer satisfaction, a client retention rate of 95 percent, and an average support response time of less than 15 minutes.

Our exclusive focus on law and professional services firms and the deep domain experience of our employees are a rich resource for clients throughout the lifetime of their system. By collaborating with clients we are continually learning and are able to develop the products you need to optimize your performance and achieve your goals.

CONCLUSION: SUCCESS = MODERN TECHNOLOGY + NON-DISRUPTIVE MIGRATIONS + GOOD USER EXPERIENCE

When evaluating a financial and practice management vendor in today’s disruptive and competitive legal environment, several factors need to be considered. With the challenges of declining revenues, globalization, and shifting IT needs, effectively managing a law practice requires tools, service, and support designed specifically for you. The options available need to be carefully evaluated before deciding on a course forward.

As with any technology purchase, there are several risks to consider including technology risk, adoption risk, implementation risk, and support risk. As mentioned earlier, some possible effects of not implementing a new practice management system in a timely manner can result in inaccurate or late billing with immediate impact to cash flow. Additional implications include lack of compliance with mandated standards, and the risk of incomplete information which may cause misrepresentation of clients and result in malpractice claims.

Aderant offers a world-class financial and practice management system that can easily be configured to meet your exact requirements. Our dedicated professional services and support teams deliver customized conversion and implementation services as well as the ongoing support you need to maintain peak operations. Aderant is a partner you can trust to ensure that your financial and practice management system provides the functionality you
need to run your firm and support your strategic goals for years to come. The operational benefits that our clients gain include:

- Access to cutting-edge functionality sooner
- Reduced integration issues
- Extremely responsive and knowledgeable client support
- The ability to participate in new product development
- Eliminating the headaches of working with multiple vendors
- Faster deployment and higher user adoption rates
- Lower total cost of ownership

These benefits then lead directly to the things that really impact your success:

- Recording and billing more time
- Increasing collections and compressing the cash flow cycle
- Improving profitability
- Increasing lawyer and staff satisfaction
- Automating processes and reducing paper use
- Supporting mobile devices
- Responding to client requests (new pricing models, billing information, matter status, etc.) faster
- Getting actionable performance management data to accurately track performance and enable smart decision making
- A stronger infrastructure that enables you to better leverage new opportunities for the success of both your partners and your staff

If you’re considering a new practice and financial management system, explore all of the advantages that Aderant’s client focused approach can bring to your firm.
ABOUT ADERANT

With more than 35 years dedicated to delivering practice management solutions, Aderant is the world’s largest independent legal software provider offering comprehensive practice and financial management solutions for law and professional services firms of all sizes worldwide. With more than 3,200 clients, their products and services are designed to help securely, effectively, and profitably manage your firm and gain a competitive advantage.

From case and financial management to business intelligence, CRM to legal calendar and matter management, Aderant offers a wide suite of legal software solutions to optimize operations, protect assets, and increase the bottom line. Ultimately, the focus is to help manage, grow, and protect businesses with innovative, proven solutions that are backed by superior service and ongoing support.