Software Analysis

Case Study

# CHOOSING THE RIGHT SOFTWARE

# SOFTWARE ANALYSIS CORPORATION CASE STUDY:

## CHOOSING THE RIGHT SOFTWARE

### BACKGROUND

Our client had at least six separate programs they used to run their practice. None of these programs integrated with each other and it was taking an inordinate amount of time to track and manage a matter. Customers completed intake sheets manually, or the information was taken over the phone. This information was entered in two case management programs, one document generation program, one accounting program a Word document case list and an Excel document case list. Conflict of interest checks were done manually in several of the packages.

The firm relied heavily on physical file folders containing intake sheets, background notes, conflict checks, matter-related emails, time entries, invoices, and correspondence. A file folder location report was produced so that physical files could be found. Although not the case here, firms like this often have offices that look messy leaving clients with the appearance of disorganization and sloppiness.

The data was “everywhere” and “nowhere” to be found. Data needed to be consolidated and processes developed and followed.

The client was a small law firm with less than 5 attorneys and a ratio of two staff for each attorney. The firm had purchased the practice of a retiring attorney. In addition to the inherited client base, however, they were saddled with the former firm’s procedures and outdated software. They did, however, have the benefit of the experienced staff from the prior firm. Because they lacked training, however, they were not aware of the capabilities of their existing software. The software could have eliminated much of the duplication. The software was technologically old, and the changes would have been many. For this reason, they were all in agreement, they needed a new, fresh start.

Our client was seeking a solution with a single point of entry. They wanted a cloud-based solution capable of meeting all their requirements or able to integrate with the accounting and document generation software of their choice.

### THE PROCESS

#### DETERMINE REQUIREMENTS

We interviewed all the staff individually. Experience shows us staff will say what their bosses want to hear when the bosses are in the room. Private sessions with assurances no information gathered would be directly attributable to any one person, produce more honest answers. We do not provide questions in advance because we do not want scripted answers. Answers written in advance are filtered and subdued. ***The goal here is to get the real story to enable the firm’s management to face the reality of the situation and make the necessary decisions***.

### DATA ANALYSIS

We use a spreadsheet approach to software evaluation. This helps to make decisions statistically rather than on impulse. Good demos can be very persuasive but often show you features you do not or cannot use. For each type of software, we have a list of functions, a column for the firm to rate its importance, and then a place to indicate if the evaluated software has that function. This results in a statistically rated evaluation based on needs. The top three packages are then selected for vendor demos. View Instructions and Sample Spreadsheet here.

### EVALUATION

After determining their requirements, evaluating the capability of the staff, and their data migration needs, we presented them with 5 possible solutions. One solution was to keep some of the software they already had, set up integrations, eliminate duplicative procedures, and get training. We evaluated cloud-based packages concentrating primarily on case management with accounting and document management integration. We also evaluated all-inclusive packages. Our report discussed the pros and cons of each solution.

### DEMOS

We set up three demos. As their consultants, we talked with the software vendors in advance and gave them background on the firm, their requirements, their pain points, and what we wanted to see during the demo. We never got past the second demo. The client subscribed to the software right on the spot. This is not something we normally recommend but it was the strongest solution for them and the one most highly rated in our spreadsheet.

## ON-GOING COLLABORATION

For most cloud-based practice management solutions, we recommend the client use the vendor's services for the migration. They have the tools, staff, and techniques to simplify the process. When the client data is coming from software we are familiar with, we can work with the client and software vendor to prepare the data for migration.

In addition, we provide project management support to ensure a smoother roll out. The software vendor generally has a project plan for the migration portion of the work. They do not think of the other, non-migration tasks involved. For example, they do not think about ordering new check stock in advance or the migration to Office 365 that might be needed.

While cloud vendors say they have free training, it is often little more than a list of videos you can watch. Some have one-on-one sessions to get you through the setup. This may not be included in the subscription cost of the software. The training, however, is generally geared to teaching you how to use the software. They do not spend time evaluating what your firm needs for its day-to-day management. We work with our clients to show them what reports are useful and why. For example, we cover the implication of nonbillable versus billable time when evaluating flat fees or attorney's profitability.

***Software Analysis Corporation can be with you through the entire process of Evaluation, Selection, Migration, Implementation, Training and On-Going Consulting.***

There are times for DIY jobs and times to get professional assistance --please contact us. You should value your time. Let us help you. Visit us at www.sachicago.com, email info@sachicago.com, or call us at 630-825-6400 or 312-388-6464.