

How to Select and Successfully Implement a Matter Management Solution for Your Office

This article is Part II of a two-part article on Selecting and Implementing a Matter Management System at a law office. The first installment focused on your internal review of why you need a matter management application and selecting the right vendor. In Part II, we will now talk about how to plan for and implement the matter management solution at your firm.

Part II - Successful Installation of the Matter Management Solution

Once you have selected a matter management vendor, you will need to work to make sure that the implementation is successful. This section will discuss various considerations involved in the installation of a Matter Management System.

Matter Management Systems will change the way that you work and it is best to discuss ahead of time how the work processes will change after its implementation. The following is an overview of planning procedures and design consideration, as well as thoughts on how to train your users properly.

Pre-installation:

- ✍ Team – Select a team of users to work on the project. The team should be a manageable size, but should include the key people. All sections of the office should be represented, including different practice areas as well as different roles (attorneys, paralegals, secretaries, and IT staff).

- ✍ Product Review Meeting – During the selection phase, you will probably have reviewed several matter management applications. Therefore, users may not remember all the features of the system that was actually selected. Have a meeting to demo the software to your team and then start them thinking concretely about how the program will be adapted to meet your unique needs.

- ✍ Project Manager – You should select an internal project manager to handle the project on your behalf as well as insist that the vendor assign a project manager as well. This will streamline communication between the parties as the installation project moves forward.

Timeline

Shortly after the selection of the matter management system, the respective project managers can work together on a project timeline. Make the vendor aware of important deadlines at the outset. This will only be a “perfect world” timeline for the project and that future events may well change those dates as the project moves forward, but the timeline is an essential roadmap for the stages of the project.

Design Phase

The design phase is an important part of the process where you will adapt the program to meet your own requirements.

- ✍ Get samples of database designs from the vendor for ideas of what other clients are tracking for different areas (i.e. litigation, IP, contracts, etc.)
- ✍ Review your existing data-gathering applications such as MS Access databases, Excel spreadsheets, etc. that members of your department may already be using.
- ✍ Schedule time for teams of users to work with the system designer to develop a working prototype.
- ✍ Have a small group of users test the prototype to determine what changes need to be made.
- ✍ Continue this aspect of the project until you have the database the way that you want it to be. Be aware that you will probably never have the “perfect” database. In the best installations, the database will need to be regularly revised to meet your evolving needs.

Training:

Training will most likely be divided into sessions for administrative training and end user training.

- ✍ Administrative Training – Who will be responsible for administering the application once the program is installed? Will it be IT or will it be a “super-user” in the legal department? Carve out time and budget for at least two people to be trained at this level.
- ✍ End User Training – You will need to determine the best way to train your staff. Should you divide the group by job responsibility (i.e. all attorneys trained together) or should you train by practice area? Each has its advantages and determine upon factors internal to your organization.

Other Aspects: You may have other aspects of the project that are unique to your organization.

- ✍ Determine which reports and template documents are necessary for the successful installation of the project. Again, you shouldn’t expect every report and letter to be available in the first phase of the project.
- ✍ Will data be made available to others outside the legal department such as other corporate employees or outside counsel?

Continuing Requirements

Once the matter management program has been implemented, the process is not over. It should continue to evolve as the needs of your department grow and develop.

Periodic post-installation reviews: You should plan periodic reviews of the system to make sure that it continues to meet the needs of the legal department. This may be done annually or semi-annually.

Ongoing training: Training is a key aspect to incorporating any new technology. If you are going to make the investment in technology, you should be willing to make the investment in training your staff to fully use the application. We have also found it very beneficial when clients are willing to schedule a second round of training at a later time, perhaps 6 months after the initial training. This allows users to get comfortable with the basic functions of the software and then they are able to absorb more advanced techniques at a later time. Also, make sure to have one of your staff capable of training new incoming employees.

Upgrading Considerations: Your matter management vendor should keep you notified of new features and upgrades as they become available. Feel free to be proactive in this area – keep in touch with your vendor and make suggestions about new features and functions to improve the product. Many of the best ideas that are added to software applications first came from users.

Conclusion

More and more firms are grappling with the challenge of implementing a Matter Management System at their firms. After years of putting off the decision, they are finally ready to change and go through the necessary channels to make the technology work for them. We encourage the firms we work with to look at technology as an investment rather than an expense, since facilitating work processes has a direct effect on improving their bottom line. I hope that the insights I have shared in this article will help you to get to the next step in your firm's development so you can move forward and truly prosper.