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Top 5 Considerations When Shopping for Practice Management Software

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Every firm is different, but a few things remain the same for all law firms looking to purchase a practice management program, regardless of their size, practice areas, or level of technical aptitude. Here are the top 5 things that should be considered when shopping for practice management software to run your law firm:

1. **Understand the investment of time** it will take to do the necessary research to find the right program. You will need to work with a consultant who asks you a ton of questions, learns about your business, your process, your situation, and your goals. This can't happen in a 5 minute conversation. You will need to demo multiple programs, and multiple people with multiple perspectives on your firm's needs should be included. Balance this with too many cooks in the kitchen, but make sure the right areas of your practice are represented, and have the ability to ask pointed questions about the product so they can see how they will do their jobs. Nothing makes our teams more nervous than wondering how they will do their jobs once the change is implemented.

2. **Know what you are trying to accomplish**. If you attended a seminar and left feeling like you should have Practice Management, know why you felt that way. Did you recognize that you have inadequate conflict searches? Are you trying to make it easier to share data across firm members? Are you struggling with capturing your billable time? Are you looking to automate processes? Are you looking to automate documents? Find documents? Do you want to be able to see phone call and emails others in the firm have had with the client? Do you require a contact and calendar sync with Outlook? Do you need something that will run in Windows and Mac? How important is remote access? DO you have reporting requirements? Most importantly – ask your TEAM what they need. Do not assume that you know…just because they are getting their jobs done doesn't mean they have what they need. Survey your staff – and give them a voice.

3. **Know what else you already use**, and why you use it. Integration with Practice Management programs is a big deal. Take an inventory of your hardware and software – they are important elements. Do you use office products like Outlook, Word, Excel? Or, are you a Google Apps firm? Do you use a PDF program like Adobe, FoxIt, or others? Do you already have a Time, Billing and Accounting program? Do you use Practice Area specific software? Forms

software? Remote time entry software? Do you run reports out of a current system that will need to be duplicated? Does one paralegal keep a spreadsheet safely on his or her desktop that is backbone of the whole practice? A good consultant will help you identify whether there will be redundancy, or integration possibilities. Remember, technology is supposed to make things easier, not harder. And make sure you ask everyone. As the partner or the firm administrator, you might be surprised what people are using, and how much they rely on it.

4. **Require good demos**. All vendors and their sales team can give you a quick overview of their program, and most can even send you a video. But you will need more. You should spend no less than an hour looking at a program with a qualified member of the vendor's consulting team, or, an Independent consultant who can give you a tailored demo based on the unique needs of your firm. Do not buy anything after seeing a 15 minute video, or because your friend from law school uses it and likes it. Have examples of reports you need available for your demo consultant. Provide real life scenarios to your demo consultant so you can see how the software will improve your life – and the life of your staff.

5. **Start thinking about Cost, Cloud, and Commitment**. If you go into the purchase of Practice Management with a preconceived idea of how much it should cost, or a preconceived idea as to whether you will use a Cloud program, and WITHOUT the commitment (financial and time) to making the product work, your implementation will be a bust. Cost is absolutely a consideration – we know people can't write blank checks. Understand your firms' financial position, what they are willing to invest, and consider payment options like leasing, etc. Start thinking about whether you would entertain a Cloud option. If you had an opinion about Cloud 3 years ago, open your mind and think again. Cloud isn't the right choice for all firms, but it is solid option and should be given a chance. And finally, be committed. If you spend the money on the software, be committed to learning it. Be committed to providing your staff a perpetual resource for continued learning, and don't give up.

Today's guest post is by Jennifer M. Ramovs, Esq., who is Director of Training & Education at Affinity Consulting Group.

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