

## Upgrading Your Law Firm's DMS? Pitfalls to Avoid

Attorney at Work Daily Dispatch

By Brian Ruthruff and Dodie Edelstein

Upgrading your existing document management system, or designing an entirely new law firm DMS, does not have to be a huge drain on time and resources. Be aware of common pitfalls and use a systematized approach, and the process can be relatively quick and painless.

**Planning.** If you are going to upgrade, get a detailed analysis of the changes made to the program — specifics that go beyond the vendor's "ReadMe" file. This process involves careful thought and planning. You want to make sure all the older features that work well for your firm are going to be there, too, and function the same as they did before. Users will need to know the real differences they will see in the updated system. Prepare to spend a good chunk of time on planning — more than on any other part of the project. It will pay off in the end.

**Focus groups.** To make sure you end up with a DMS that fits your firm, you want users to see real involvement in the planning process. To gain buy-in, you must hear people out, address their concerns and bring them together. Focus groups are great for this. Do it right, and focus group members should end up being some of your biggest cheerleaders as the system rolls out. We start focus group sessions with a short PowerPoint presentation on what makes up a good design, examples of similar designs and what their role is. In addition, we always have a working version of the system with an initial design as a starting point. In short, try to focus the focus group.

**Do not forget training!** Know what new features are available and how you are going to train users in them. Especially with today's "matter-centric" designs, training is paramount for boosting user adoption rates.

Even if system features aren't new, some users still won't know about all the functionality available to them. Searching the DMS is one example of a critical training need. Now that all your documents are in a database, how can you find them? How does an attorney look for the best work product without just searching for the words "motion" and "pleading"? A DMS is only as good as the documents you can find once it is implemented. Everyone needs to know all the tricks to finding firm work product.

**Know the way back.** Yes, there needs to be one. Every implementation plan needs rollback options, though they should only be used as a last resort. With proper planning this should not be an issue, but it wouldn't be "proper" without it either. Sometimes planning for a disaster is the best way to prevent one.

### **Rollout Day**

Upgrading or switching to a new DMS is a big deal. Be sure to announce it in advance — several times — and make the day fun by bringing in something festive to ease the transition.

Floor support for users is key on days just after the rollout. We recommend having the same group of people that delivered the training available for floor support on rollout day and for an appropriate number of days after rollout. They'll likely have bonded with your staff during the training, and can be available to literally walk the floors, helping users with things they have missed or forgotten. You might also consider one-on-one training for anyone who missed the scheduled training sessions.

### **Hold On — You Aren't Done Yet**

Efficient user-driven software programs require an iterative approach to keeping current and on track with user needs. That means periodic reviews of the functionality, adoption rates and design, as well as advanced and continual training.

"Lunch-and-learn" sessions work nicely for follow-up after the launch, and for advanced training. Bringing in lunch encourages attendance and can help people fit more into their day. A trainer can spend about 30 minutes on review, allowing time for questions and answers. Subsequent sessions, held on a quarterly or some other periodic basis, can cover advanced topics.

Careful and considerate planning can control the chaos, ensuring that you bring your firm up to date with today's technology without making it tomorrow's headache.

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