NJSBA PRACTICEHQ

PRACTICE MANAGEMENT SOFTWARE IMPLEMENTATION CONSIDERATIONS

Implementing a practice or case management system, especially cloud-based solutions like Clio, is far more involved than installing standard office software. These systems require careful customization, integration with existing tools, and significant forethought to align with firm workflows. Below are practical considerations to guide your planning and ensure successful adoption.

DON'T EXPECT A PERFECT FIT

No software solution will match your ideal workflow 100%. Most systems are customizable and can meet 90–95% of your needs. Understand this from the start and focus on achievable goals and meaningful improvements.

DEFINE YOUR GOALS

Before choosing a system, list the problems you want to solve and the functionality you wish to gain. If growth is in your future, ensure the system scales accordingly. Also, outline reporting needs in advance; what data do you want to track, and what reports are essential?

WHAT PROBLEMS ARE YOU TRYING TO ADDRESS

If you're considering a practice management program, then you probably already have a list of issues that you'd like to take care of. Write them down.

WHAT FUNCTIONALITY WOULD YOU LIKE TO GAIN?

Write down the features you would like to take advantage of. Sometimes reading about what you could have helps you determine what you need or want.

PLANNING TO GROW?

If you plan on adding more employees or partners, you need a system that can grow with you.

REPORTING REQUIREMENTS

One of the big advantages practice management programs give you is the ability to run reports about your practice. For example, if you're in litigation, it would be nice to see a report of all upcoming statutes of limitation. If you're a probate attorney, you might want to see a list of all upcoming due dates for all probate matters (dates that things need to be filed, *e.g.*, inventory & appraisals, fiduciary accountings, estate tax returns, etc.). Think about this in advance and make a list of reports you absolutely need and any that would be otherwise useful. Also include in your list the pieces of information you want in each report.

ASSESS SOFTWARE AND HARDWARE COMPATIBILITY

Inventory existing tools and hardware. Include word processors, email, accounting software, document management systems, mobile devices, and scanning tools. For on-premises systems, document computer specs, antivirus software, remote access tools, and backups. Ensure compatibility to avoid integration headaches.

INVENTORY OTHER PROGRAMS AND DEVICES YOU PLAN TO CONTINUE USING

For example, you want your new practice management program to work with what you already own, so write down all of the names, versions/editions of existing software, web services, and devices. Very importantly, you need to identify:

- Word processor(s)
- Email applications
- Accounting program(s)
- Document assembly software (if any)
- Document management applications (if any)
- Scanning software (*e.g.* Adobe Acrobat, ScanSnap, etc.)
- Smartphones you would like to synchronize with the system and whether the vendor offers a full app or a mobile-responsive website

INVENTORY HARDWARE AND NETWORK

Here are some other pieces of information you'll need, especially when considering a server-based, as opposed to cloud-based, solution.

LOG-INS AND PASSWORDS

Software will need to be installed on your server (if you have one) and all connected computers. Therefore, the person who handles the installation will need to know the login and password for each computer (including the server).

COMPUTER SPECS

Age, specs, and operating system for every computer in your office. If you have a Windows computer and would like to know its specific configuration, you can use free applications like Belarc Advisor to produce a configuration report.

REMOTE ACCESS

If you have more than one office or want to work from more than one location (say home and office), what type of connection exists between the two places? How to you gain remote access? For example, are you using a VPN, terminal services, Citrix, TeamViewer, GoToMyPC, etc.?

BACK UP

You'll need details about how your backup system works (hard drive, Internet, type of backup software being used, etc.).

DATA IMPORT

You most likely do not want to start out with an empty practice management program if you already have case information entered into another program. For example, you might have all of your current clients in Outlook or a contact management program. You may also already use a billing or accounting program, which you should record in the software inventory mentioned above. You would want all of your case billing information and contacts imported into the practice management program you're considering so you can hit the ground running. You want to make sure that anyone you work with on a practice management program implementation is aware of these facts well in advance.

PRACTICE INFORMATION

The following information will be relevant for customizing a practice management program for your practice. You can save yourself some time by compiling this information now.

USERS IN YOUR OFFICE

How many lawyers, paralegals, legal secretaries/assistants, law clerks and other support staff do you have? Are they located in one physical office or are they spread across multiple offices? Do you have anyone who works from home?

CASE/FILE TYPES

Types of cases you handle - for example, estate planning, real estate, probate, etc. It's fine to have a "miscellaneous" option as well.

PARTY TYPES

Parties are people or entities involved in a case and they're specific to the type of case. For example, in a probate matter, you have decedent, fiduciary(ies), judge, heirs/beneficiaries, and the like. If it were an entity formation (say a new corporation), then you might have shareholders, directors, officers, and an incorporator. In a litigation matter, you might have opposing counsel, plaintiff, defendant, witnesses, insurance agent, judge, etc.

CASE INFORMATION

For each type of case, compile a short list of information that you need quick access to. For example, in a probate matter, you might want to know 1) date of death, 2) social security number of the decedent, 3) testate or intestate, 4) county of domicile, 5) probate court case number, 6) fiduciary's name and contact information, etc.

CONTACT GROUPS

A "contact" is any person or entity that you deal with. If you were to go through your contacts (names, numbers, and addresses), what groups would you use to classify those contacts? Of course, many of the group designations may apply to a single contact. For example, you might have clients, judges, lawyers, friends, co-workers, etc.

BE STRATEGIC WITH CUSTOMIZATION

While customization is powerful, over-customization is counterproductive. Only create custom fields for frequently used, high-value information. Avoid building fields for details that are rarely referenced or redundant, as this can lead to a cluttered and underutilized database.

For example, if you handle estate planning, you may be able to set up additional data fields within an estate planning file where you could enter hundreds of pieces of information about each client. The reality is that this is overkill and most firms end up never entering anything into all of those little fields they set up; and those who actually do enter data in all of those fields end up with an enormous, unwieldy database. Custom fields should be used for information you frequently have to look up or need to track for recordation or documentation purposes. Do you need a custom field in order to look up who a client chose as their second successor co-agent in their financial power of attorney? Probably not. Therefore, those kinds of things are a bad use of custom fields.

KNOW YOUR LIMITS (DIY VS. EXPERT HELP)

Practice management implementation is not a plug-and-play task. You may read the manual and still miss vital setup logic. Hiring an experienced consultant may accelerate deployment and reduce mistakes. Think of it as central air installation, not a window A/C.

BE PATIENT AND ESTABLISH A SCHEDULE

Don’t rush rollout. Create a staged implementation plan with timelines for configuration, training, and migration. If a vendor or consultant can’t provide a plan, it’s a red flag.

INVEST IN PROPER TRAINING

Training is essential. Budget for multiple sessions, ensure they’re hands-on, and expect each team member to require 6-8 hours to get fully comfortable. Without training, even the best system will fail to gain traction.

PLAN FOR ONGOING MAINTENANCE

Cloud-based systems include support in the subscription fee. For on-premises tools, factor in ongoing maintenance contracts, upgrade costs, and third-party tech support. Often, your consultant can resolve issues faster and more cost-effectively than vendor help desks.