



Forget limits. Switch to limitless.

The big guide to switching Case management software for law firms

PART 1

 [Get started](#)



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1 Welcome

There comes a time in any ambitious and growing law firm when your existing legal tech is becoming outdated, inefficient and causes more issues than it's resolving. Rather than go through the pain and hassle of moving, you stick with it.

But what if there's a more efficient, productive, collaborative and profitable way for everyone in your firm to work? Sound too good to be true? We're here to tell you that it really is an option.

Designed for law firms, this guide aims to provide everything you need to know about switching from your existing case management software to a new one and highlight how pain-free the process can be, especially when you have the right supplier on your side helping at every step.

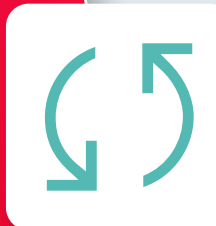


2 Pain-free switching

Switching your main case management software is a significant undertaking for any law firm. Our team have been helping, guiding and supporting law firms to do just that for years and having done it many times over; we have become skilled at taking any unnecessary pain away.

We've pooled together everything we've learned over the years and collated it into this comprehensive guide to help you prepare for switching and to avoid the common pitfalls.

It's all a question of knowing when it's time to make the move. So how do you know?



Tell-tale signs your law firm is ready to switch to new software

With over 3,500 customers, we've been able to analyse the reasons why law firms are currently looking to switch. As a result, we've identified the main drivers for change and have categorised them.

You can read the more detailed analysis in our blog, **"Why are law firms switching software systems?"**



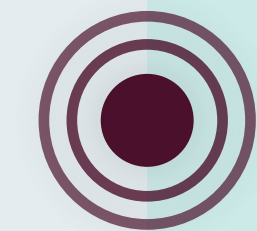
Frustration

Firms feel frustrated by their current software, lack of integration, doubling up on work, hidden costs and hit-and-miss support.



Hesitation

A fair number of firms are hesitating to switch their software, but in contrast, it's seen as necessary to bring their firm case management into the 21st century.



Risk

The driver for many is that they are finding in the age of cyber-threat, they are not satisfied with the current IT infrastructure, which they had been relying upon is not secure enough.



Addiction

"We've always done it this way." – is a hard nut to crack for many law firms. A fair number have admitted they had been addicted to outdated processes and paper for too long and acknowledged they need to make the switch to leave all of this behind.



Empathy

Recognising that people are their greatest asset and wanting to do everything they can to empower their workforce to achieve a better home/work balance – they switched to give them the right tools.



Carelessness

This is a serious bug-bear for many law firms and is not always easy to solve with outdated technology. Realising the Practice is haemorrhaging cash because it's not able to capture all its billable time consistently and efficiently enough.



Distraction

Finally, many firms have told us they have been so distracted with the day-to-day that they know they need to up their game for their clients, who they acknowledge deserve better.



3 To switch or not to switch... that is the question

The reasons highlighted are very real, significant and compelling; yet it is often the case that fear is the biggest blocker when it comes to switching.

- ✗ Fear that it's too big of a task to deal with right now.
 - ✗ Fear that there will be too much distraction from the day-to-day
 - ✗ Fear that disruption will affect clients
 - ✗ Fear the data isn't clean enough to move across
 - ✗ Fear that staff morale will suffer due to changes
- The list is endless.

We know there is never a 'good time to switch; however, as a firm, you'll know when the time is right. When you get to the point where the fear of not switching becomes greater than the fear of switching – you'll be ready.



Switching starts here

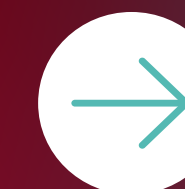


You've decided that now is the right time to switch, the obvious next question is where on earth you start.

Ideally, you should go into this with the mindset that you are not swapping like for like, but you're looking to develop and grow your firm for the future.

So what does this look like?

Check out our top 10 tips for law firms to consider when switching





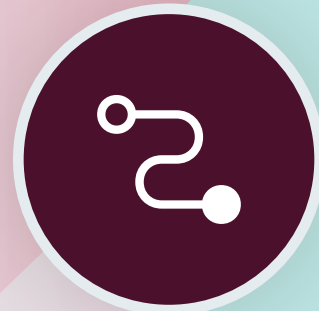
Business Objectives

Find out if the potential new case management system aligns with your business objectives – how can it help the firm meet its growth, efficiency, compliance, and marketing goals?



The Detail

Be hyper-detailed and do a 360-degree review of all processes, appointing system champions from each department to break down your strategic goals and interpret them as ultra-specific KPIs and ROI goals for your new system. E.g. increased fees billed; cash received, reduced debtors, cases per fee earner, billable hours per fee earner etc.



The sales process

De-mystify the sales process and make it work for you, ensuring you get a full view of all expected costs.



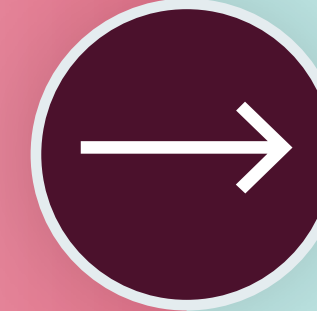
Cybersecurity

Look under the bonnet – in terms of cybersecurity. Check out your new vendor's track record and security credentials.



Integration

Do not underestimate 'integration'. Is the system fully integrated or just interfaced, and does it provide integration to your mission-critical third-party applications?



Longevity

Future-proof your decision by asking about the vendors' technical foundations. Is its operating system solid and reliable, is its software language proven, is its security tools trusted by the majority, and is it sure the software does not rely on outdated components? And does it have an impressive roadmap for the future?



Reference sites

Check references – there is no better testimonial than one from an existing user.



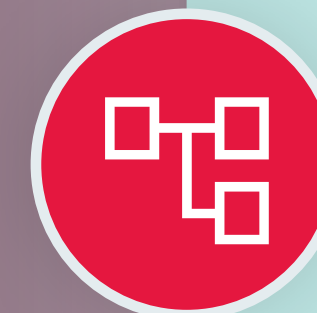
Stability and viability

Assess supplier viability – review their financial stability and chances of being around for the long haul.



Your data

Ensure you can retrieve your data if ever you decide to leave them. Some don't make it easy. It's your data. In compliance with GDPR, a good software supplier will make your data available.



Workflow customisation

Don't fall into the trap of over-customising your new system beyond recognition just because you can. Flexibility is one thing, but firms can go too far, making it difficult to maintain, support and train. Enjoy the flexibility, and customise to fit your business, but listen to the experts on how far to go.



4 Involving stakeholders and making a business case

Sometimes change can be difficult, we've found that the key to overcoming this obstacle is clear communication. This starts with identifying who your stakeholders are, as it's a good idea to bring them into the loop early.

The focus has to be 'no surprises'



Engage the stakeholder relevant to your law firm, for example



CLOP/COFA



IT



Fee earners from across all departments



Marketing/business development



Finance



Partners / senior leadership team

Throughout the implementation, the aim is to ensure these stakeholders fully understand the process and how it will affect them.

Once you have your stakeholders, it's time to get everything in order and create a solid business case for switching.



1

Building the case

Typically a business case should provide a clear picture of the current position, including the issues and impacts. Define exactly why this needs to change and improve, along with the consequences of not doing so.

Highlight how the suggested change sits comfortably within the law firm's strategy and how making the switch will support the firm's business goals. The overarching objective of switching your case management software is to improve the current way of working, increase efficiencies and productivity and provide an improved client experience. To achieve this, you need to be sure the benefits are achievable and 'Does exactly what it says on the tin.'

In our experience, firms with the most successful business plans and, therefore, a smooth implementation have clear expectations, defined measurables and an open-minded team. Including all measurable benefits and showing how they will support the overarching objective with clearly defined owners and deadlines will ensure success.

2

The Financials & Budget

Include some financial analysis in terms of how long you expect the pay-back period to be and perhaps involve your finance colleagues and ask them to help you calculate the true worth of the project by looking at its discounted cash flow (DCF), its Present Net Value (NPV) and its Internal Rate of Return (IRR) and perhaps some financial modelling.

Ring-fence a budget for the project, in particular, consider whether it will be paid for out of the current budget or future budget. It's always prudent to add a contingency, but if you have a good software provider, you can work with them to bring the project in on time and on-budget.

Carrying out this detailed analysis will highlight the areas where the biggest efficiency level can be found. You will need to focus more time on these areas as these will help with the growth and development of the firm.

3

Risks

Part and parcel of any project is an element of risk. Highlighting all the key risks upfront will ensure you build a solid and well-thought-out business plan. There are many elements to switching software at this scale, so be sure to explore everything that could impact the project.

4

Wrap up

The executive summary should give an overview of the salient points of the business case, enabling the firm's key stakeholders to quickly understand the rationale behind switching and start to form a decision. The rest of the document then needs to go into detail about each of the salient points raised in the executive summary to give the stakeholders the confidence that you've done your homework.

The whole point of creating a business case is to help the organisation make decisions quickly to benefit it. Whether this is internal with the people using the software and finding it helps their productivity or externally with clients, customers and stakeholders to ensure they are being given the best service possible.



Summary

If there's one key piece of advice we would like to share with you, it's that time spent planning your switch project is never time wasted.

Making sure you've made your case and are communicating effectively right from the start is really important and will help deliver the case management system your law firm requires.

Remember to download the second part of our guide which you can find [here](#) and good luck with your project.

[Download Part 2](#)





Forget limits. **Switch to limitless.**

Bring your legal case management up to spec and join the growing list of legal firms switching to working without limits.

Take on any task, any time, any place with the full weight of your practice thanks to one seamless, secure, cloud-based platform.

Discover legal case management without bounds.

Make the switch



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About The Access Group

Working in partnership with more than 3,500 UK law firms and underpinned by over 30 years of sector experience, Access Legal provides an unrivalled suite of complete software solutions.

From case and practice management, finance, accounting and business intelligence to learning, compliance and HR – Access Legal helps firms take control of their time, improve efficiency and productivity.

By providing software to manage every aspect of a firm's operations, Access Legal enables ambitious firms to reach unlimited potential and have the freedom to focus on clients and people to drive profitability and growth.

The suite of Access Legal technology solutions work in connection with one another, creating one single view for people, data, and systems within the new Access Workspace for Legal.