access Legal

Forget limits.
Switch to limitless.

The big guide to switching Case management software for law firms

PART 2

Let's continue

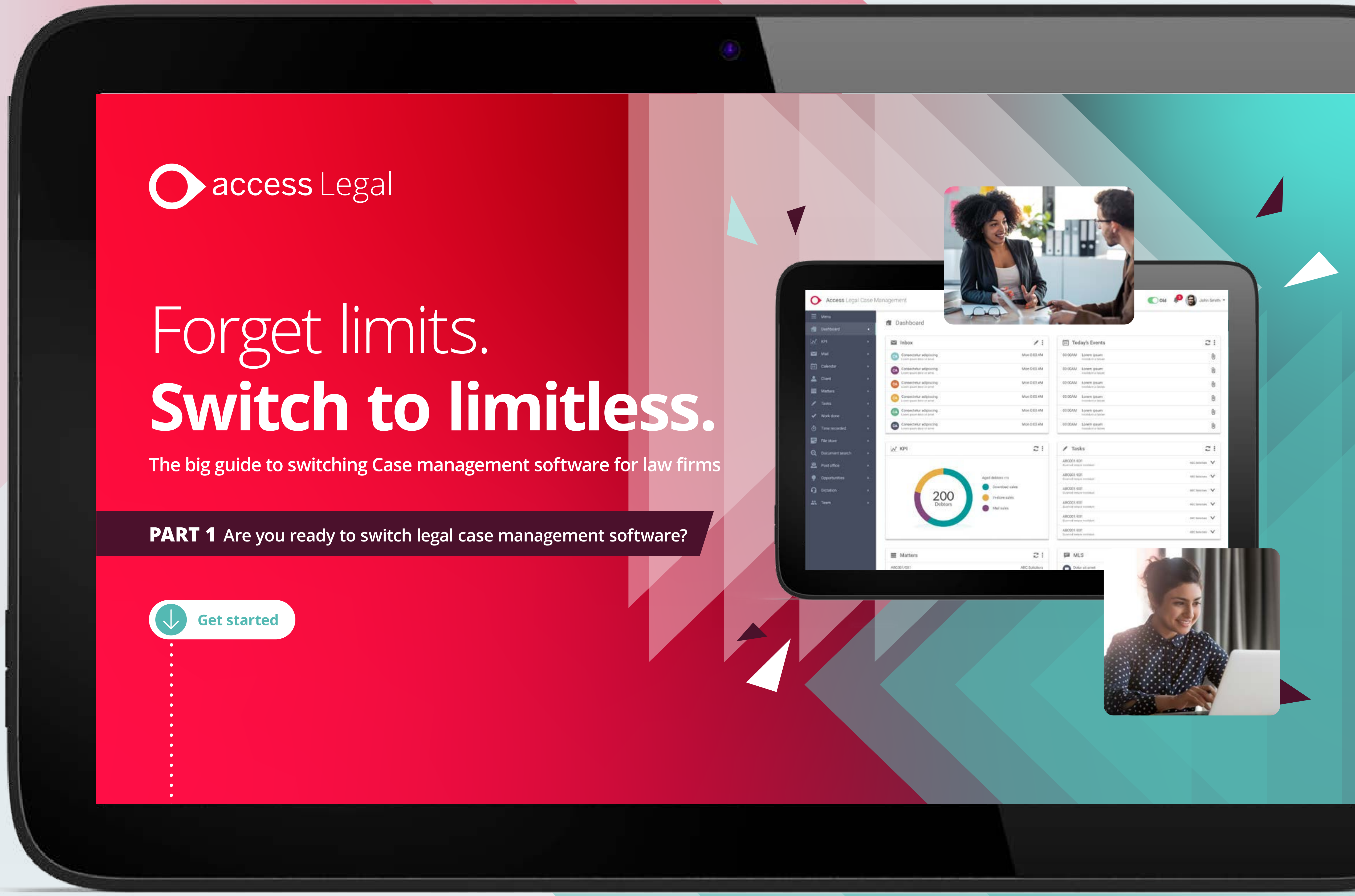
Part 1 of our guide

Taking on the challenge of switching your legal case management software can be overwhelming. The good news is that with a clear and concise plan in place, it can be exciting, especially when you're able to grow and evolve as a firm.

In part one of our guide, we helped you identify the tell-tale signs that you're ready to switch legal case management software, outlined some tips on what to consider when making the switch and helped you prepare a solid business case.

If you haven't already downloaded it yet.

Read part 1 of our guide



Part 2 of our guide

In this second part, we will help you navigate the world of cloud vs on-premise and how to successfully migrate your data to ensure a smooth transition to your new case management software. Towards the end of the guide, we set the scene on what you can expect from our onboarding process.

Contents

1 Cloud Vs On-Premise

In 2008, the then CEO of Google, Eric Schmidt, is believed to have coined the phrase 'cloud computing' when he spoke at a conference, and now a majority of organisations all over the world have moved some or part of their business systems to the cloud. Accelerated in a way by the impact of the global COVID pandemic that caused a significant shift in the way we do business.

Should more law firms be looking to the cloud with the new hybrid way of working?

For many law firms, there remains an element of hesitation around security and accessibility that the fear level we spoke about previously around moving is outweighed by the fear of data security and 'being hacked.'

Let's break it down. **The fundamental difference between cloud vs on-premise is where your 'stuff' resides.**

On-premise case management software is installed locally on your business computers and serves, whereas **cloud software** is hosted on a supplier's server and accessed via a web browser.

As well as accessibility and supporting your staff to work remotely, a wealth of other things need to be considered when deciding which option is best for your firm.

The pros and cons of cloud vs on-premise case management software

Scalable: Primarily, cloud legal software can scale with the firm's ambitious growth plans. All that's required is a user license and a browser, allowing businesses to quickly and easily add new staff.

Accessibility: The whole firm can access client files and communicate with their co-workers and clients securely at any time, from anywhere on any device, without the need for a VPN.

Cost-effectiveness: Because cloud-based legal software doesn't require an initial investment in servers, databases, and data centres and the staff to manage it, the upfront costs for the cloud are lower than for on-premise software. These cost savings can be extended throughout the lifecycle of the cloud legal software because the firm can avoid the costly and disruptive upgrade cycles required by on-premise software.

Automated updates: Probably the most significant advantage of opting to host your legal software in the cloud over on-premise is that it is always up to date and that everyone in the firm is operating on the same version. Updates are pushed through from the supplier and take effect immediately with little to no disruption, unlike on-premise, which requires a manual intervention to update, which can lead to people ignoring or snoozing to another time.

Uptime: Cloud-based software generally offers a guaranteed up-time of 99%.

Security: Storing sensitive client information is a common headache for law firms, from the days of storing large paper files to, more recently, the adoption of cloud technologies. However, cloud-based software is often considered more secure than more traditional data centres. Firms must comply with GDPR to ensure that clients' information is protected and that they can control access to their personal information. ISO 27001 is the international standard that stipulates best practices for information security management, and you need to ensure that your legal software supplier has this accreditation. Access Legal follows this standard to safeguard its own data, and the data it handles on behalf of its clients are adequately protected. We also perform regular security assessments to identify potential risks and devise an action plan in the unlikely event of a data breach.

Support: More often than not, on-premise software can be bespoke; support is managed by a team of in-house or outsourced IT professionals. This can provide several issues and possible points of failure, especially when it comes to the location of the support team; perhaps they're in a different time zone.

We provide you with a named technical support engineer based in the UK, access to a wealth of knowledge-based articles, an online user community and product group roadmap briefings to ensure you are never left in the dark.

2 Data Migration

The value of your data should never be underestimated, and so it's an important consideration when switching your case management software.

In essence, data migration is the process of retrieving a firm's data from its previous legal software package and importing it successfully into the new system. When it comes to data migration, the needs of one law firm can differ significantly from another.

We've put together a few things to think about, as important to have a detailed and robust plan in place.

Clean data is good data

When you start with your new case management, you want to ensure that your data is as accurate and useful as it can possibly be.

That's why we would recommend that before you carry out any data migration, you need to do a full data cleanse. There is no point in migrating your data if it contains errors and information that's no longer needed.

Check out our 11 top tips for successful data migration

TIP: As a starting point, review your client's contact information, making sure you have their name, address and contact details.

Migrate what you need and only what you need

Once you've cleansed your data, you need to decide what you actually **NEED** to migrate.

Do you really want to migrate the last 20 years of client records, or is it better, to bring only the last 6 years' worth of records?

There is no 'right' answer to this, and you need to do what's best for your firm and your clients. We do advise that you decide upfront the level of complexity you require from your data migration.

For guidance, we've set out four possible options:

Static Data

- Client data
- Contact data
- Matter data

Static & Balance Data

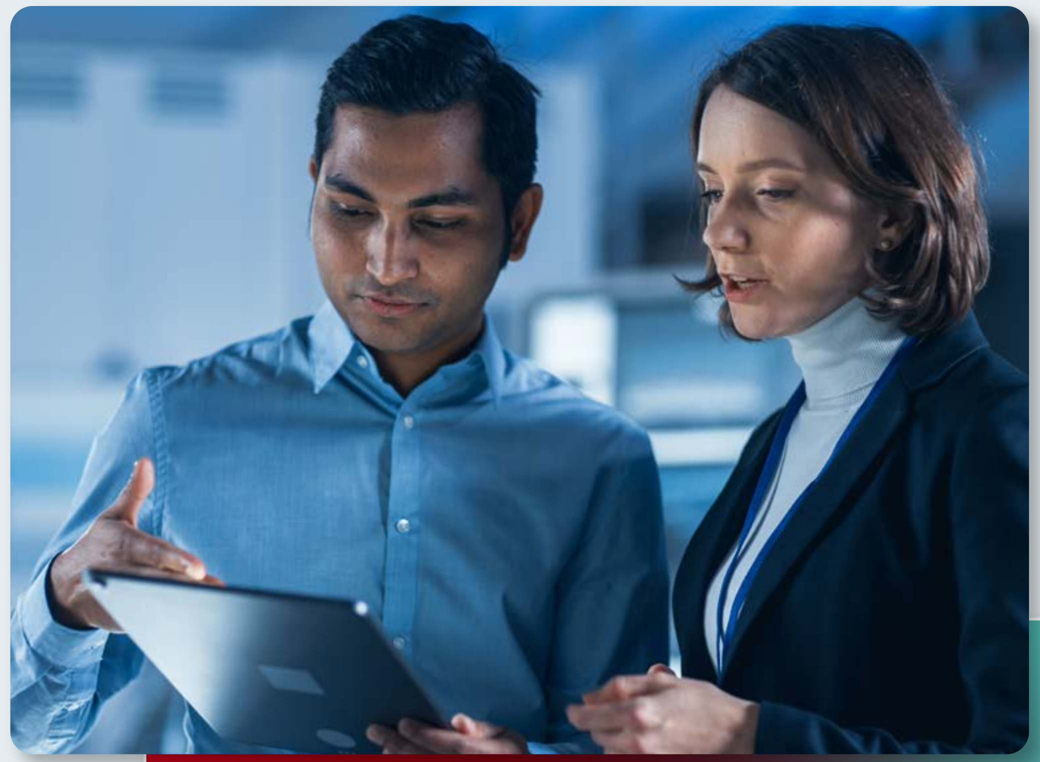
- Client data
- Contact data
- Matter data
- Top Level balances

Static, Balance & Transactions Data

- Client data
- Contact data
- Matter data
- Balances
- Transactions

Full Transfer

- Client data
- Contact data
- Matter data
- Balances
- Transactions
- Case Management
- Documents
- Peripheral data



Remember:
The more data you move, the longer it takes and do you really want to clog up your new case management software with information you may never access?

3 From interest to implementation – we're there every step of the way

You've downloaded the brochure and want to take the next step but are not sure what will happen next.
Well, worry not; we've created this simple journey to outline our onboarding process.

Discovery

One of our trusted advisors will call you to discuss your needs and identify the right software fit.

Bespoke Demo

We believe in the freedom to do more; now that we've got to know you better, we will build you a bespoke demo around those needs and wants from our discovery call. After all, no two law firms are the same, so why would their case management needs be the same?

Proposal

We now have everything we need to create a proposal; this will include everything you need for a smooth implementation, from FlightPaths, data migration, and training to Flexpoints.

Find out more

Welcome to Access Legal Session

This is where you'll meet your project team, a team of dedicated implementation experts who will be on hand to ensure a smooth transition to your new legal case management software. A key meeting where a detailed project plan will be discussed and agreed upon; within this plan, we agree on your system configuration, settings, features and functionality relevant to your firm.

Data migration

During the welcome meeting, we will take a sample of your data to review and assess how it will transfer to our case management software. Once we fully understand your data, one of our analysts will create a piece of code which will be used to run the data conversion. The data will be tested, and the results along with next steps will be available to the entire project team.

Testing

Almost there, the testing phase is where you will test your new case management software in the real world. The objective is to sense check that everything is where it should be and you are happy with the fact it will handle the live day-to-day running of your law firm. Any issues will be feedback to the project team, who can adjust if necessary.

Training

Our trainers will provide in-depth training to your in-house trainer, something we like to call Train the trainer. You'll also have access to our Customer Success Portal which contains a wealth of information.

Go live

The bit you've all been waiting for, we can now Go Live with your new case management software.

We don't stop there. Our team of Customer Success Managers are on-hand to help you get the most from your case management system to help you achieve your business goals, improve adoption rates and increase ROI.

4

So there you have it…

Replacing your legal case management software doesn’t have to be daunting

As you can see, there are several steps from initial interest to implementation. Still, each of them is pretty straightforward, as we want to ensure that when it comes to switching your legal case management, it is as smooth as possible, and you’re happy with it.

Finally, enjoy the process; this is your opportunity to become the efficient, productive and profitable law firm that will help you achieve your business objectives. When you have your new legal case management in place, and people are using it, adding value to the firm and clients, you’ll feel such a sense of achievement and satisfaction. Good luck, and enjoy the process.

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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

www.theaccessgroup.com/legal

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.