Buying an IT solution for your firm

By Rob Laird

Deciding to implement a new IT solution is often one of the biggest decisions a law firm will make.

Few single events can be as daunting or have greater potential to shake up the status quo. A revamped IT solution can have an impact that goes way beyond the firm's original objectives. These are usually perceived in terms of an overall vision, cascading down into strategies, tactical elements, and operational decisions. For example:

- **Vision** – We will double in size within three years.
- **Strategy** – We need to attract new clients so we can increase our billings.
- **Tactic** – We want to email our bills as PDFs to our clients.
- **Operations** – We need to produce our bills at 4pm on the last Friday of the month.

Many organisations find it difficult to step back and look at the big picture. Endless day-to-day decisions keep management focused on the tactical and operational levels. Without careful planning, solutions can be mapped in a way that reinforces anachronisms and inefficiencies, ultimately further restraining a firm's ability to adapt to change – rather than providing the flexibility to leverage change.

A new IT solution might well facilitate billing by 4pm on the last Friday of the month and produce bills in PDF format. But will it help to achieve the firm's vision (and associated strategies) for the future?

The fundamental key to success in making an effective IT investment is to understand your firm's requirements and identify the best solution accordingly. This involves accurately defining your firm's goals, translating these into operational and tactical requirements, and then evaluating and mapping appropriate solutions to meet these specific needs.

Sounds fairly simple? I can assure you it's not. Projects mostly come unstuck during this planning stage – a failure that is often not realised until too late, when there are few options left to fix it. Getting the right people involved from the start is critical.

Many medium-sized-plus firms have in-house IT people responsible for the day-to-day management of IT systems and operations. Smaller firms tend to use external IT contractors.

In-house IT teams offer skills that are not only vital for running existing systems, but are also very important in defining future requirements. But often they lack the knowledge or experience to manage and drive change – 'change management' or 'business transformation', as opposed to generic 'project management' skills.

When deciding if you already have the requisite expertise available, ask yourself whether your IT team has successfully implemented a new software solution for either yourself or a similar law firm.

Whatever the answer, don't fire your IT people, they are extremely valuable! But the relevant experience is gained mostly through working with larger IT services vendors, or on large IT projects. Commanding top dollar in the IT industry, these specialist skills are finely tuned to manage change, not just an existing system.

Document your requirements by discussing how best to approach this important project with your existing IT support team, whether internal or external, taking into account the resources available.

A simplified example of how to map requirements and solutions (in a real-world scenario, there would be many goals, each spawning many requirements) would be:

- **Goal:** Grow the practice by making use of existing but under-utilised legal skills.
- **Current inhibitors:** Workload inhibits the development of new clients in new areas, the hiring of experienced people and overloads support staff.
- **Requirement:** Reduce workload on existing admin staff.
- **Solution:** Identify and automate some key admin tasks to free up admin resources.
- **Solution attribute:** Must automate admin tasks and demonstrate savings.
- **Expected result:** Admin staff can help to develop new areas of law.
- **Measurement:** Billings in new areas.
- **Key performance indicator** (KPI): Stasis or better in existing billings, increased billings in new areas, overall increase in firm profit.

Having identified the firm's requirements, next evaluate options and select the appropriate solution. The success of this process depends largely on the quality of the preceding requirements-capture and solution-mapping phases. It is possible to do a fantastic job of selecting the right solution for the wrong job (and vice versa)... ■

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