SIMPLEX BI

TOP THINGS TO FOCUS ON WHEN IMPLEMENTING ADERANT EXPERT

EBOOK

Implementing a new law practice management software can seem overwhelming, but it doesn't have to be. Aderant Expert helps run and organize the business of law practice. This software is a solution that delivers global financial management, case and matter management, time and expense capture, fully featured billing and e-billing, and enabling practice tools with secure, mobile access.

But before you can take advantage of all of these incredible features, first you need to implement the system. By following the outlined steps below, you should be able to implement Aderant Expert with ease fully.

PROJECT CHARTER

Developing a project charter is a critical step in the success of your implementation, and it is often overlooked. The Project Charter establishes the framework for the project and should be referenced throughout the project to make sure you are following the framework you set at the beginning of the project. The project charter should identify the following critical elements:

- Reasons for taking on the project
- Goals of the project
- Risks
- Change Management Procedures
- Identify Sponsors and Stakeholders
- Project Budget

ASK YOURSELF THIS QUESTION:

HOW WILL YOU KNOW IF THE PROJECT WAS SUCCESSFUL IF YOU HAVE NOT DOCUMENTED WHAT YOU SET OUT TO ACCOMPLISH?

ESTABLISH A COMMUNICATION PLAN

Execute regular communication with your Sponsors and Stakeholders. This is typically done on a monthly basis. Look to your Sponsors for guidance on project changes and challenges. Also, be sure to establish firm-wide communication.

This may be in the form of quarterly updates via Email or in other ways. Having a well-laid-out communication plan allows for any issues to be relayed quickly and efficiently, and any updates can be distributed easily amongst the team.

SYSTEM CONFIGURATION

When configuring your new Aderant system, do not try to replicate everything you had in your prior system. Take the time to understand the firm's needs and the capabilities of the software to be sure you can accommodate the firm's management and reporting needs today and in the future.

You might not always be able to have a one-to-one replacement for old reports, but that doesn't mean you can't create or find a report to replace it within Aderant.

DATA CONVERSION

Converting data from your legacy system to your new Aderant system is a critical step in the implementation process. This is the highest risk area of your project because if the data does not convert correctly, you will be chasing issues for a very long time.

Remember: "Garbage in, garbage out". It is better to get this step right the first time than continue to build around data that is incomplete. This is arguably the most important step of the process.

BILL TEMPLATES

Bill template development is possibly the most difficult and underestimated aspect of your Aderant implementation. "Standard" templates can be a nice way to start your template development, but every firm requires a significant amount of custom template development to meet the needs of their attorneys and clients.

Consider a third-party consultant to take on the development. You will need a resource who can pay a lot of attention to your needs. Make sure that your needs are clearly laid out, and a plan is developed so that the third-party developer can execute what you need in a timely and effective way.
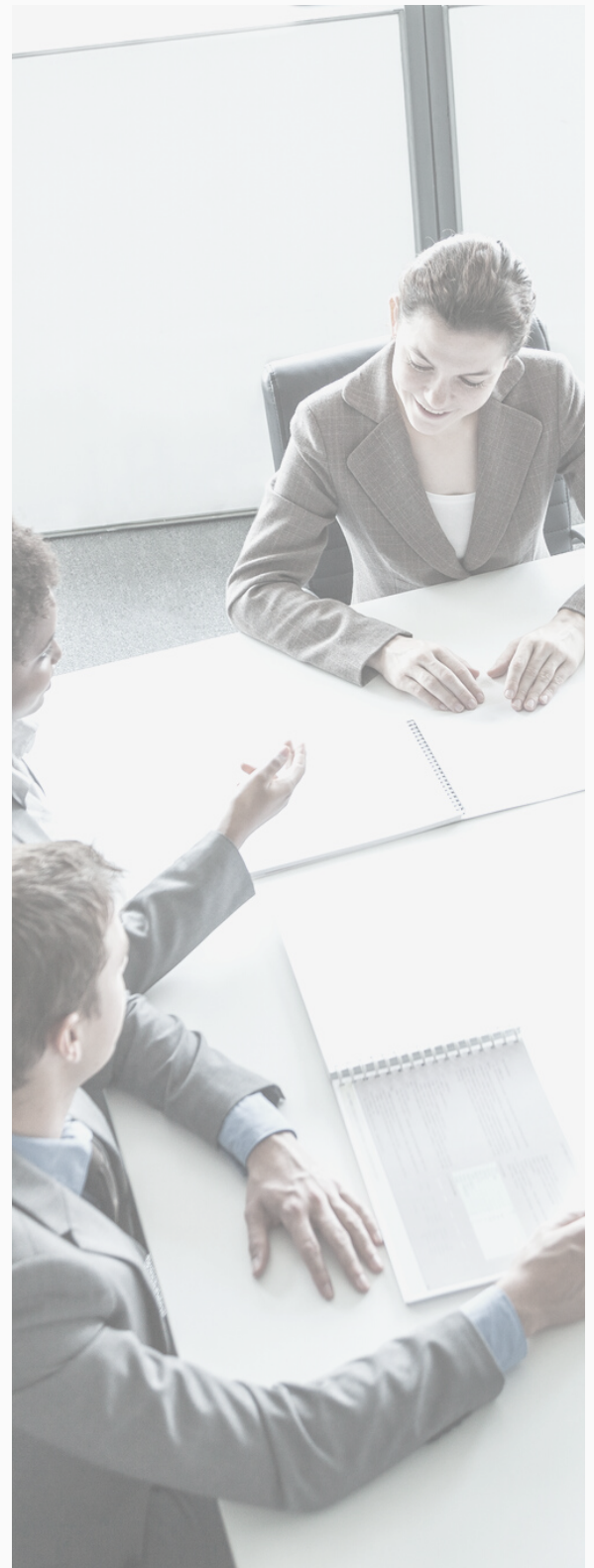
REPORTING

This is another critical aspect of your implementation. Aderant is delivered with lots of reports, but your firm has specific ways of looking at data these standard reports cannot replicate. Without a doubt, you will need some level of report customization.

Identify your reports early in your project and get started with development. Similar to Bill Templates, engaging with a third-party consultant is the most efficient way to complete your custom reporting needs. Given that these reports are something that will serve as the backbone of the firm's reporting, this step is absolutely critical.

TRAINING

Train your core accounting staff early in the project. It is critical they are proficient with the new software by the time you go live. The core staff will also be essential in testing the system. Train your attorneys, and other "front office" staff close to the go live.

If they are trained too early, they will need additional training at the time you go live. This is because you will be continually molding the system to the firm's needs, and if you train the lawyers too early, you will constantly be returning to teach or re-teach them later down the line.

TESTING

Allow time for a significant amount of testing. The testing process will identify gaps in business processes, data conversion issues, and configuration errors and will reinforce the training received by the staff.

There are countless issues that can pop up and be fixed during the testing phase, that is why it is so important to have a long testing phase. Not only does the testing phase let you fix the gaps in your system, but it will also allow the accounting team to become intimately familiar with the system and its workings.

ATTORNEY INVOLVEMENT

Be sure to involve the firm's attorneys in the parts of the implementation process that impact them the most. If you do not include the attorneys, you will certainly hear about it later! At the end of the day, the Aderant system is all about making life easier for the firm and its lawyers.

You can spend hours upon hours molding a system that you think works best for what is needed, but without input from the people that will be using it every day, you aren't going to get very far. You don't need the lawyer's input at every single stage, but for the ones that will involve them the most, it is best to get all the feedback possible.

SIMPLEX BI CAN EFFICIENTLY IMPLEMENT ADERANT EXPERT AND OTHER SOFTWARE WITH EASE

When it comes to implementing new software for law firms, mistakes aren't an option. Aderant Expert can be the backbone of your law firm's business, but if it isn't properly set up, it can lead to billing errors, crucial information being lost, and it has an impact on your bottom line.

That's why it is so important to have things like a large and long testing phase, proper data conversion, and billing templates created in a way that passes along meaningful information to your staff and clients.

Simplex BI specializes in implementing Aderant Expert. Before beginning the implementation of something that can make or break your law practice, contact us today. Our team of consultants and experts can help you at any phase of implementing software and meet all of your needs.

GET IN TOUCH TODAY!

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