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Technology Track – Session 1

**Overcoming Obstacles:
Implementation Mindset for
Legal Tech**

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About the Presenter...

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Overcoming Obstacles: Implementation Mindset for Legal Tech

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Introduction

Implementing new technology within any business can be difficult. It can be particularly difficult in law firms. Legal professionals are busy. Whatever the technology, they are heavy users of that technology and in specific ways. For example, they create lots of complex documents that take advantage of many word processing features that non-legal users are not even aware of. Legal users create so many time entries and generate so many bills that an entire industry of legal-specific time, billing and accounting systems exists to serve those needs. They also save many documents they may need to find quickly at some unknown point in the future.

Most users of legal technology develop a specific way of doing things and do those same things repeatedly for years. Telling them they must do those things in a new and different way immediately causes anxiety and objections. Even if they know that the way they are doing things is not very efficient, the thought of doing it differently and perhaps no more efficiently concerns them.

Unfortunately, your people are often the biggest obstacle to successfully implementing new technology. This does not have to be the case. If the typical objections are an emotional response to being asked to change, you need to address those responses. Forcing change does not work nor does simply asking people to trust that the result will be a good one. Instead, you need to begin addressing these concerns at the beginning and continue to address them throughout the project. A successful implementation depends on “buy-in” from your people. The only way to achieve this is to assure them that you are actively thinking about how the project impacts them.

Common Obstacles to Change

You already know this but most of the obstacles related to implementing new technology relate to your people. While it might seem like it, your people do not have a natural resistance to any new technology. Their resistance is the result of having a different perspective than management regarding technology and how changes impact them.

Firmwide technological changes usually come from the top and they should. However, in many cases, management wants to solve a problem that staff are not even aware of. Management then tasks a small group such as a technology committee to find a solution. Meanwhile, the first indication that changes are coming is a general announcement after a decision has been made or, even worse, water cooler rumors of the change. The staff is left wondering why a small group is driving such change.

In addition, technological changes impact staff differently from how those same changes impact management. Management sees improvements in productivity and the financial health of the firm. Staff simply want to get their work done and go home at the end of the day. For them, technological changes make their jobs harder – at least in the short term. They wonder how they will complete their work while learning how to do it differently.

In short, different segments of the firm have different mindsets concerning changes to technology.

Management's “Big Picture” Perspective

When it comes to implementing new technology, law firm management often considers a broader array of factors that staff may not be privy to. One of the most significant considerations is the ongoing costs associated with current technology systems. While staff may view familiar tools as functional and reliable, management evaluates whether these tools remain cost-effective in the long run. Are maintenance fees escalating? Are there hidden costs that are not immediately apparent? These financial implications are crucial for ensuring the firm remains competitive and sustainable. By taking a comprehensive look at expenses, management can make informed decisions that not only enhance efficiency but also safeguard the firm’s profitability.

Moreover, management often seeks to address issues that staff may not be fully aware of. For example, the limitations of existing billing and accounting systems can significantly impact the implementation of new initiatives, such as a fixed fee billing structure. If the current system cannot accommodate these changes, management must actively seek alternatives that align with the firm’s strategic goals. The need to streamline operations and improve financial transparency can drive the decision to adopt new technology, but if staff are unaware of these underlying issues, they may feel bewildered and resistant to change. This gap in understanding can create friction and hinder collaboration.

Additionally, client expectations play a critical role in technology decisions. In today’s competitive legal landscape, clients are increasingly demanding cost savings and enhanced services. They want assurance that their data is secure and that they are receiving value for their investment. This heightened focus on client satisfaction places pressure on management to explore technological solutions that can address these concerns. By investing in tools that improve efficiency and reduce operational costs, management aims to enhance the client experience while maintaining profitability. Communicating this focus on client needs can help staff recognize the importance of adapting to new technologies.

Furthermore, the legal industry is governed by professional responsibility guidelines regarding technology use. Management must navigate these regulations carefully, ensuring that the firm's technology not only meets client expectations but also complies with ethical standards. This includes considerations around data security, confidentiality, and the proper handling of client information. Failure to adhere to these guidelines can result in severe consequences for both the firm and its attorneys. By understanding that management is working to safeguard the firm's reputation and integrity, staff can better appreciate the urgency behind technology changes.

It is also essential to recognize that management's decisions are often data driven. They may analyze performance metrics, client feedback, and market trends to identify areas where technology can make a meaningful impact. This analytical approach enables management to make informed choices that align with the firm's long-term objectives. However, if staff are not involved in this data-driven process, they may feel disconnected from the rationale behind decisions that directly affect their work. Engaging staff in discussions about data and performance can help bridge this gap and foster a sense of ownership and involvement.

Effective communication is key to bridging the divide between management and staff regarding technology changes. By sharing the broader context—financial considerations, client demands, regulatory obligations, and data-driven insights—management can foster an environment of understanding and collaboration. This transparency not only demystifies the decision-making process but also encourages staff to see technology changes as integral to the firm's success rather than disruptions to their routine. When staff feel informed and involved, they are more likely to embrace new technologies, understanding that these tools are designed to enhance their work and contribute to the firm's overall goals.

The Technology Committee's Thankless Role

In many law firms, a small technology committee is formed to address the pressing need for innovation and efficiency. Typically composed of individuals who are interested in technology—often younger and newer members of the firm—this committee is tasked with carrying out management's directives regarding technology improvements. They are directed to research and identify potential solutions to specific problems, bridging the gap between the firm's strategic goals and the practical implementation of technology. However, this internal dynamic can sometimes create a perception of disconnect among other staff members.

Those not on the technology committee may feel alienated from the process, leading to misunderstandings about the committee's intentions. Instead of seeing the committee as a group dedicated to finding solutions that benefit the firm, they may view it as a collection of younger individuals pushing for changes that disrupt established practices. This perception can foster resentment and resistance, particularly among seasoned staff who may feel that their expertise and experience are being overlooked or undervalued. When changes are proposed without widespread consultation, it can reinforce the belief that these initiatives are being imposed rather than collaboratively developed.

The reality is that committee members are often motivated by a desire to enhance the firm's operations and address specific challenges. They may be excited about the possibilities that new technology can bring, such as increased efficiency and improved client service. However, without adequate communication about their role and the rationale behind their research, their efforts can be misconstrued. This disconnect can lead to frustration on both sides—committee members feeling misunderstood and unappreciated, while non-committee staff grapple with the feeling of being sidelined in important discussions.

To mitigate this issue, law firm management should emphasize the importance of inclusive communication regarding the technology committee's activities. Regular updates about the committee's objectives, research findings, and the technology being considered can help foster transparency and build trust. Involving staff in discussions about potential solutions not only enhances collaboration but also ensures that diverse perspectives are considered. By creating an environment where everyone feels their voice is heard, the firm can alleviate the tensions that may arise from perceived imposition.

Furthermore, providing opportunities for informal discussions between committee members and non-committee staff can facilitate relationship-building and understanding. Encouraging members of the technology committee to share their insights and rationale for proposed changes in casual settings can help demystify the decision-making process. When staff have a chance to engage with committee members, they may gain a clearer understanding of the goals and challenges involved, fostering a more cooperative spirit.

A successful technology initiative hinges on the collective buy-in of all staff members. By addressing perceptions and enhancing communication, law firms can transform the technology committee from a source of contention into a valuable resource that represents the collective interests of the firm. When staff members feel involved and informed, they are more likely to embrace technology changes, recognizing them as necessary steps toward the firm's ongoing success.

The “If It Isn’t Broken, Don’t Fix It” Mindset

In many law offices, routines can become as ingrained as the furniture. Staff have been doing things a certain way for so long that it feels like second nature. This “if it isn’t broken, don’t fix it” mentality might seem sensible at first glance; after all, if a system has worked for years, why mess with it? However, this mindset can stifle innovation and hinder growth.

Think of it like driving the same route to work every day. Sure, it gets you there, but what if there is a faster, more efficient route you have never considered? The reluctance to change can lead to missed opportunities. Legal technology evolves rapidly, introducing tools that streamline workflows, reduce errors, and save time. Sticking to outdated methods might not cause immediate harm, but over time, it can become a serious roadblock to productivity and efficiency.

Encouraging a culture of curiosity and openness to change can yield significant benefits. It is about shifting the conversation from “Why change?” to “What can we gain?” By challenging the status quo, staff can uncover new ways to enhance their processes and improve their work environment. Embracing change, rather than fearing it, opens the door to innovation that can elevate the entire firm.

The “I Don’t Have Time to Learn Something New” Mindset

We have all been there. Your law office staff is juggling a hundred different tasks, trying to meet deadlines, handle clients, and keep the office running smoothly. The idea of stopping their workflow to learn new technology wants to ask them to run uphill with a backpack full of rocks. “I don’t have time for this!” or “This is going to slow me down!” are the first reactions you will hear. And on the surface, it makes sense. When everyone is focused on just getting through the day, the last thing anyone wants is another obstacle.

But here is the problem with that mindset: it is a short-term view. Yes, learning a new system may take time upfront, but clinging to inefficient methods has a hidden cost—a much larger one. Think of it this way: would you keep driving a car that breaks down every few miles because you are too busy to shop for a new one? Eventually, the cost of lost time, frustration, and missed opportunities adds up. The same goes for technology. By investing a small amount of time to learn a new system now, your staff can actually save hours every week down the line.

It is not about adding work to their plate—it is about clearing it. When staff members are freed from repetitive manual tasks, they can focus on more valuable work, improving both their job satisfaction and your firm’s efficiency.

The “No One Understands My Job” Mindset

It is common for law office staff to feel a disconnect between themselves and management. There is often a belief that management does not fully grasp the intricacies of how staff gets their work done. The reality is that the daily grind of the office—rushing to meet deadlines, answering client inquiries, and managing a mountain of paperwork—can easily go unnoticed from the top. When management rolls out new technology initiatives, staff may feel overlooked, as if their input or concerns about how these changes will impact their workload are falling on deaf ears.

This disconnect can create a sense of frustration and even resentment. Staff might think, “How can they expect me to learn this new system when I’m already drowning in work?” If management is not actively engaging with staff to understand their workflows, it can lead to resistance to change. After all, how can staff be expected to embrace new tools when they feel their current challenges are unacknowledged?

To bridge this gap, open communication is essential. Management should prioritize listening sessions where staff can voice their concerns and share insights about their day-to-day tasks. By involving staff in the decision-making process regarding new technologies, management not only demonstrates understanding but also fosters a sense of ownership and collaboration. When staff feel heard and appreciated, they are more likely to embrace change and see new technology as an ally in their quest for efficiency, rather than yet another hurdle to overcome.

The “No One Asked Me” Mindset

One of the most common frustrations among attorneys and staff during times of change is the feeling that decisions are being made without their input. When new processes or technologies are rolled out, it is not unusual for someone to ask, “Why are they changing the way I am doing things without asking me?” This sentiment can create a sense of alienation, leading to resistance and a lack of engagement with new initiatives.

When staff feel excluded from the conversation, it can foster a perception that management is disconnected from the realities of their daily work. Employees are more likely to embrace change when they see their insights valued. By inviting feedback and involving staff in discussions about new tools and processes, management can ensure that changes align with the actual workflows and challenges faced by the team.

Creating opportunities for input can take many forms—surveys, focus groups, or open forums where staff can voice their opinions and concerns. By actively seeking their perspectives, management not only demonstrates respect but also gains invaluable

insights that can lead to more effective implementations. When attorneys and staff feel heard and involved in the decision-making process, they are more likely to become advocates for change, viewing new technologies as tools that enhance their work rather than disrupt it. This collaborative approach can turn what might be a source of tension into an opportunity for growth and improvement.

Generational Dynamics

Younger attorneys are often the driving force behind technology changes in law firms, armed with a comfort level and familiarity that comes naturally in the digital age. They have grown up with smartphones, social media, and cloud-based tools, making them more inclined to explore innovative solutions. However, this enthusiasm for change can sometimes cause unease among older staff members who may not share the same technological savvy or willingness to adapt.

For many seasoned professionals, the rapid pace of change can feel overwhelming. They might view new technologies as a threat to their established methods and expertise. This generational divide can lead to tension within the office, as younger attorneys push for upgrades and new systems while older staff resist, fearing that their skills may become obsolete or that they will be left behind in a technology-driven environment.

To navigate this dynamic, it is crucial to foster an inclusive atmosphere that values contributions from all team members, regardless of their age or experience. Encouraging mentorship opportunities where younger attorneys can guide their more experienced colleagues in using new tools not only helps bridge the gap but also promotes collaboration and understanding. When older staff see that their knowledge and experience are still valued, they are more likely to embrace technological advancements, recognizing that these changes can enhance their work rather than replace it. By uniting generations through shared goals, law firms can create a harmonious environment where everyone can thrive.

Implementation Success

For this section, we will assume the firm is adopting a new document management system. This change is necessary because the firm's previous system is based on older technology and will no longer be supported by the vendor beginning sometime next year.

Pre-Project

Much of the success of a technology project is determined before the project even starts. The later you identify and begin to address obstacles, the harder they are to overcome and

the greater impact they have on the project. This does not mean that you can or will overcome every obstacle before the start of the project. It means this is the time to identify them and formulate a plan to deal with them.

If the most common obstacles to a successful project come from your people, they need to be included, in at least some manner, during this phase. At a minimum, the entire firm needs to be informed of the coming changes. This can be done in a variety of ways, but it is essential that the message meets several criteria.

First, you need to make sure to explain the “why.” As we have discussed, the firm has identified a specific need that needs to be addressed with new technology. In our example, the firm’s current document management is going away, and the firm must make a change. This need must be communicated to everyone. This is critical to addressing the “If it isn’t broken, don’t fix it” objection. People need to know that there is a reason for the change, and it is not being done simply for the sake of change. In our example, while the current document may not be “broken” today, the firm knows it will break soon and must act.

Second, the pre-project message needs to set the groundwork for what is expected of everyone during the project. This begins to address several of the other common objections such as “I don’t have time” and “No one asked me.” Who is leading the project? Will I have a chance to provide input related to my job? What training will be provided? What time commitment is expected for people during training or other parts of the project? Will I be excused or at least given some leeway with my current work during that time? These are the types of questions that people are asking. While you may not be able to answer all of them pre-project, you can answer some of them and at least acknowledge that these questions are natural and are being considered.

Third, the pre-project message must be a unified one. At this point, everyone assumes that the Technology Committee is behind the change. Even worse, if the firm does not have a Technology Committee, everyone assumes that one or two individuals are behind the change. It is critical that the message stresses that management is behind the change and in complete agreement with it. In addition, if your people are part of smaller teams, it is critical that they see their team leader agrees with the change. One of the most common ways for a project to fail is when a team leader is not on board. This inevitably trickles down to the entire team and may leave you with silos of people with low or no adoption of the new system.

How do you communicate this message pre-project? The best way is to hold a staff meeting or some sort of town hall. In this format, you can present a single unified message to the firm. The meeting should start and end with someone in senior management

expressing their support for the project. In between, the meeting can be led by someone familiar with the project details and timeline. If a technology vendor or consultant is involved, ask them to attend or even lead this part of the meeting. Often, they can answer specific project related questions but, most importantly, your people can begin to put a face to a name and the vendor can begin to build trust.

During the Project

Successful technology projects follow a process. Make sure that you have a project plan. If an outside vendor or consultant is involved, they should provide you with one. While the specifics will depend on the technology being adopted, technology projects have six phases – Kickoff, Discovery, Technical Implementation, Testing, Go-Live and Post-Project. Each of these phases plays its part in making a successful project and overcoming the objections we have discussed.

Kick-Off

The Kick-Off phase lays the groundwork for a successful project. This phase typically consists of one or more meetings during which several critical things happen. First, the project plan is reviewed to make sure it is realistic and achievable. Let us assume you plan to implement the new document management system in twelve weeks with a target Go-Live during the first week of November. Is twelve weeks enough? Are there key people who will be out during a portion of the project where they are needed? Is there an important trial scheduled for the first week of November? This will cause issues during Go-Live and during the weeks leading up to Go-Live.

If the timeline looks realistic, the Kick-Off is the time to schedule everything that can be scheduled. In particular, the required Go-Live training needs to be scheduled for everyone. If you do not do this, calendars will fill up. Similarly, if people are expected to participate in Discovery or Testing, this should also be scheduled. In particular, the Discovery phase may be beginning very soon.

The Kick-Off phase is also when you identify who will play roles in the project. The project team meets weekly or twice monthly and reviews the status of the project. This team should include at least one representative from the firm's IT department or the firm's outside IT vendor. It should also include someone who can "herd the cats" and make sure the right people are scheduled for the right project tasks. This group should also include someone who is authorized to make most of the typical decisions that come up during the project. This includes decisions such as approval to move to the next phase, approval of the migration plan or approval of the training agenda.

The project stakeholders are another critical group to be identified. This group typically consists of members of firm management. It is not always necessary that any of the stakeholders be part of the project team. However, speaking as a consultant who has led hundreds of technology projects, it is critical that I know who has ultimate authority over the project and who determines whether it was successful.

There are several other people who must be identified during the Kick-Off phase. We will discuss their roles during the following phases.

Discovery

The Discovery phase is the phase where the firm's current systems are analyzed. In our example of a new document management system, we need to learn about the current system before we can transition to the new one.

From a technical perspective, we need to know where the data for the current system is and how it is accessed. One of our maxims here is that we cannot migrate what we cannot see. In our document management project example, this means that we need to identify the data that needs to be migrated and verify that we can access it. Documents, folders, and entire matters are often secured to individuals or groups. Without the proper level of access, we do not even know that these items exist. Due to the nature of this discovery, it is critical that someone from IT is involved. It is also necessary to include the person who administers the current system and can approve, and grant access where needed.

Once the data is identified, a plan must be created to successfully migrate that data. In a complex migration such as document management, we create a "map" that identifies the existing data as well as where it will go in the new system. It is critical that someone familiar with the existing data is involved in this process even if their role is as a reviewer. They often notice things that are incorrect or were overlooked in the map. No one knows your data better than you do.

Second, the firm's technology stack needs to be identified. A new document management system needs to work with the firm's document production tools and the firm's email tools. In a time when Microsoft 365 seems ubiquitous, this might seem obvious. However, that is not always the case. For example, there are several PDF applications widely used by law firms. Will your application work with the new system or do you need to consider a change? Even after you have confirmed everything will work with the new system, there may be specific setup necessary. The rest of the technology stack may also require that specific training be included focused on integration of these other tools.

However, while much of the required discovery is technical in nature, there are critical human aspects to this phase. We refer to these as Workflow and Design meetings. These meetings are critical to addressing the “No one understands my job” and “No one asked me” obstacles. This means that these meetings need to include people who use the current system every day. This gives them an opportunity to explain how they use the current system and why they use it the way they do. Not only does this help overcome their objections, but it also provides valuable information and allows them to feel they are part of the decision-making process.

During a typical Workflow call, we dig into how people use the current system. I may do as many as four or six of these meetings with different practice groups or teams within the firm. For example, when I lead a document management project, I ask people to walk me through the lifecycle of a matter. What do they do if they receive documents before the matter even exists? How is the matter setup in the document management system? What types of documents do they create? Who do they share them with? What happens to the documents after the matter concludes? While these questions seem to relate to the current system, I am asking them to plan for the new system. The Workflow meeting is also where I identify specific training topics.

I always follow this up with a design call. In this call, I show the same groups of users a working concept of the new system. I also demonstrate exactly how certain things are done in the system. For a document management design call, I demonstrate how documents and emails are saved. I then demonstrate how those same documents and emails can be found later. If the group has specific workflows, I demonstrate my working concept of those as well. This might include things such as how scanning will work. This is not formal training. It is an opportunity to demonstrate that I listened and am working to make the transition as smooth as possible.

Technical Implementation

Technical Implementation is the phase in which the behind-the-scenes magic happens. The information gathered during the Discovery phase is used to configure the new system and migrate necessary data to it.

Exactly what happens during this phase depends on the project's nature. For this presentation's purposes, the critical thing to remember is that communication must continue. More than half of the project may fall into this phase, and it is important that people know that work is continuing. The project team should continue to meet and continue to update the stakeholders throughout this phase.

The Technical Implementation phase may extend into the next phase because certain things cannot be completed until immediately before Go-Live.

Testing

The Testing phase is where the configuration is tested, and any data migration is validated. While many things are tested by IT or the project team during the Technical Implementation phase, certain things can only be tested by an end-user.

The Testing phase can take several forms. Some firms opt to have the project team perform the testing. These people are already the most familiar with the project and the new system. The downside to this is that these people are sometimes too close to the project. For this reason, many firms opt to bring back the same groups that participated in the Workflow and Design meetings to test the system. As you can imagine, this provides another opportunity for people to feel that their voices are being heard.

Regardless of how things are tested, two things are critical: functionality and data validation. Testing functionality includes installing the software for the users who will test. This gives IT an opportunity to identify installation issues before they need to roll things out to everyone prior to Go-Live. As for functionality in our document management example, does saving Word documents, PDFs and emails work as expected? If there is a critical workflow, does it work as expected? If these things are not working as expected, is the issue technical, user or training in nature? In some cases, technical adjustments may be necessary. In other cases, adjustments to the training plan may be necessary.

As for data validation, it is critical that actual users review the migrated data. They should do this by thoroughly testing how they will access the data. Once again, no one knows your data better than the people who work on it every day. Is it where they expect it to be? If it is not, there may have been issues with the migration map. Can they find it using the new system? If not, specific training may be necessary, and the plan can be adjusted. Is the data mostly right but missing something specific? This can usually be picked up in a secondary migration just prior to Go-Live.

Go-Live

We have made it to Go-Live and are finally ready to roll out the new system for the entire firm. If you have followed our project roadmap, you have addressed many of the common obstacles along the way. However, there is still a chance that things could go sideways if Go-Live is not handled properly.

One of the easiest ways for things to go wrong at this point is failing to communicate what is expected of everyone in the days just prior to and during Go-Live. I typically conduct a

What to Expect. This session is part pep rally where I provide a short demonstration of the new system. This is because not everyone participated in the project to this point. I want to make sure that they understand that many of their peers participated and that they were heard. I will make sure to demonstrate the system's baseline functions, such as saving to the new document management system and finding things in it.

However, the primary function of the What to Expect session is to prepare everyone for Go-Live. Providing the training schedule is important but often the most important thing is to let people know how to get help when they need it. In addition, people need to know exactly when the transition is occurring and how this might impact their work. Specifically, they need to know when the old system will no longer be available. They also need to know when IT may need access to their workstation to prepare it for the new system.

Training should be required, be as thorough as possible but should not be overwhelming. This can be a fine line. People need to understand the essential functions of the system and, in a system like document management, there are a lot of them. I like to use a crawl-walk-run approach. During the initial session for document management Go-Lives, users learn how to save documents, find them again and edit them. In the second session, they learn how to save emails and begin to learn the more advanced functions of the system. Finally, a third session focuses on specific workflows and “wow” features. Even if it is conducted in-person and lecture style, you should record the training. There are always people who miss one of the sessions or would like to rewatch the training at their own pace.

Training is not the only thing that should be included in your Go-Live week. Providing support for your users is also critical. I provide Quick Tips and Support sessions. These optional sessions allow users to join at any time and ask me anything. Users are free to join even if they do not have questions as they may benefit from the questions of others. If no one has questions, I demonstrate small tips and tricks that I may not have time to cover in the formal training.

Finally, there needs to be a tracking mechanism for user issues that arise. Ideally, this will include a way for users to submit an issue as well. For simple tracking, an Excel spreadsheet or a Word document may suffice. However, users cannot submit issues in this format unless you make the file accessible and editable to everyone. Of course, email can be the method by which users can report issues, but this means that someone must read and decipher the emails as well as record the issues. Inevitably, things fall through the cracks. As an alternative, consider creating a Microsoft form that users can complete to submit issues. The data submitted on the form can be added to an Excel format list. I

use a tool called Smartsheet that provides a submission form that is automatically added to an Excel-like sheet.

Post-Project

While it may seem that your work is done, a little post-project work goes a long way toward the long-term success of the implementation.

First, you should consider refresher training. During Go-Live, many users feel overwhelmed. This is especially true if their workload interfered with their ability to attend training or the time they had to work with the new system. Another possibility is training on some of the less critical workflows or very advanced features of the new system. During Go-Live the focus is on getting started and getting up to speed. Once again, you do not want to overwhelm people with too much training. Certain things can wait until people are more familiar with the system and desire to learn more.

You also want to resolve any lingering issues that came up during Go-Live and remain unresolved. If there were a few files that were not migrated or there was an issue that needed to be escalated to the vendor. Resolve these issues now to ensure that everyone feels their issues were addressed.

Finally, you want to determine if the project was as successful as you believe it was. Survey your users to determine whether they feel additional or different training is needed. Run reports to monitor adoption of the new system. Do not just assume that everyone is happily using the new system. Follow up to make sure they are.

Conclusion

Successfully implementing new technology in your firm can be challenging. Most of your people are simply trying to get through their workday. They are naturally resistant to changes that they perceive as adding to or causing them to fall behind their existing workload. They are particularly resistant to changes that they feel are driven by someone who does not understand or who has not considered how they work every day.

Communication is the key to overcoming these common obstacles. Once people understand the why, they are much more likely to “buy in” to the project. Maintain that “buy in” throughout the project by strategically including the right people at the right parts of the project. This tells people their concerns are being addressed and they are part of the process.

About the Author

Jeffrey S. Krause is a Wisconsin attorney and a senior consultant with Affinity Consulting Group where he is a member of the document management and Lawyerist teams. He has spent more than twenty-five years assisting legal organizations of all types and sizes choose the right technology and use it the right way.

Jeff writes and speaks on a variety of topics related to legal technology and efficiency. He is a long-time planning committee member and a past chair of the Wisconsin Solo and Small Firm Conference and the Milwaukee Bar Association Law and Technology Conference.

In 2024, the State Bar of Wisconsin honored him with the John Lederer Service Award, which celebrates lawyers focused on improving the lives and practices of solo and small firm attorneys. In bestowing this award, the bar recognizes Jeff as exemplifying the leadership, spirit, and dedication of attorney John Lederer, who saw it as his mission to help solo and small firm lawyers master the skills and technology needed to build their practices.