How to change legal software

Lessons from the hermit crab

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SOFTWARE

There are more than 800 species of hermit crab. Their size and habitat vary wildly, but they have one thing in common. Rather than growing their own hard exoskeleton, they have to find and claim empty shells to inhabit.

Eventually, a crab will outgrow its shell and look for another. It won't pick a new shell at random, or just choose the prettiest one. It'll carefully assess if a shell is going to meet its requirements. It'll then make the switch with proper timing and preparation; without those, the transfer is fraught with danger.

In that, there's a lesson for law firms. You might have outgrown your current platform or software and need to find a better fit. Here's how to follow the example of the hermit crab, understand what you need, and switch the right way.

Time Recording

One question will tell if you need to change your time recording process. That question is 'Are we recording our time properly?' If the answer is 'no', then you need to do something differently.

It's not as simple as telling your teams to record their time. You've already done that. They're not doing it because it's too painful. At the end of a tough working week, you're asking them to slog through one of the most agonising activities in their professional lives. No wonder they quietly forget to do it.

How do you know how to change it? Ask. Your fee-earners know why they dislike the system you're using, and what will help them do timesheets properly. What's more, if you consult them about what they need, they'll have no reason to resent a new platform. Nor will they have any excuse not to use it well.
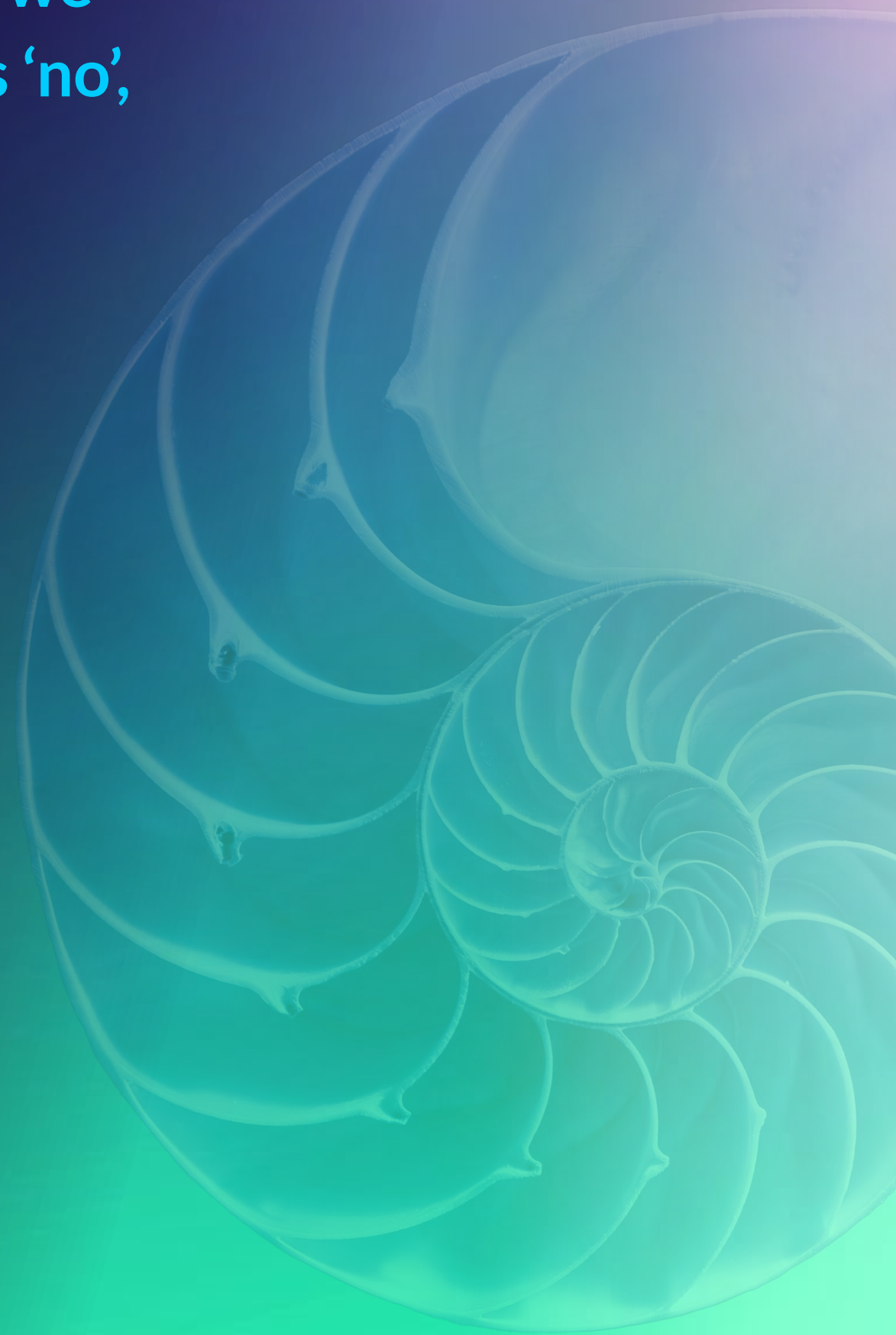
Case Management

Your case management can be a victim of its own success. A growing reputation means a growing workload, and firms need to adapt their processes to bear the extra weight, or things will soon stop going so smoothly.

It's also not certain that you'll be able to add to your headcount at the same rate as new business comes in, so you need to make sure your teams are well-supported.

It's generally not difficult to tell if there's a problem, but often you find out too late, when something has dropped or the quality of work has dipped. Preventative measures are especially important when you have a hybrid workforce and the work isn't fully visible as it happens. Tailored case plans and structured workflows reassure firms, fee-earners, and support staff that everything is accounted for, anticipated, and scheduled.

Client Communication

A growing client base doesn't just multiply legal work, but also the surrounding client care. More clients mean more client service, and it's not just the straightforward increase in volume that can be a challenge.

More clients mean a greater variety of client characters. It's one thing to manage more relationships, but it's another to manage a portfolio of dramatically different behaviour, requirements, and expectations.

The challenge in finding a single solution is that one size doesn't fit all. In that case, how do you know if a client care platform is going to work? The answer to that is a portal that clients can engage with as much or as little as they want. Centrally holding requests, updates, documents, and information allows an element of self-service – clients can take what they want and need, and the firm doesn't have to learn by trial and error how to treat them.
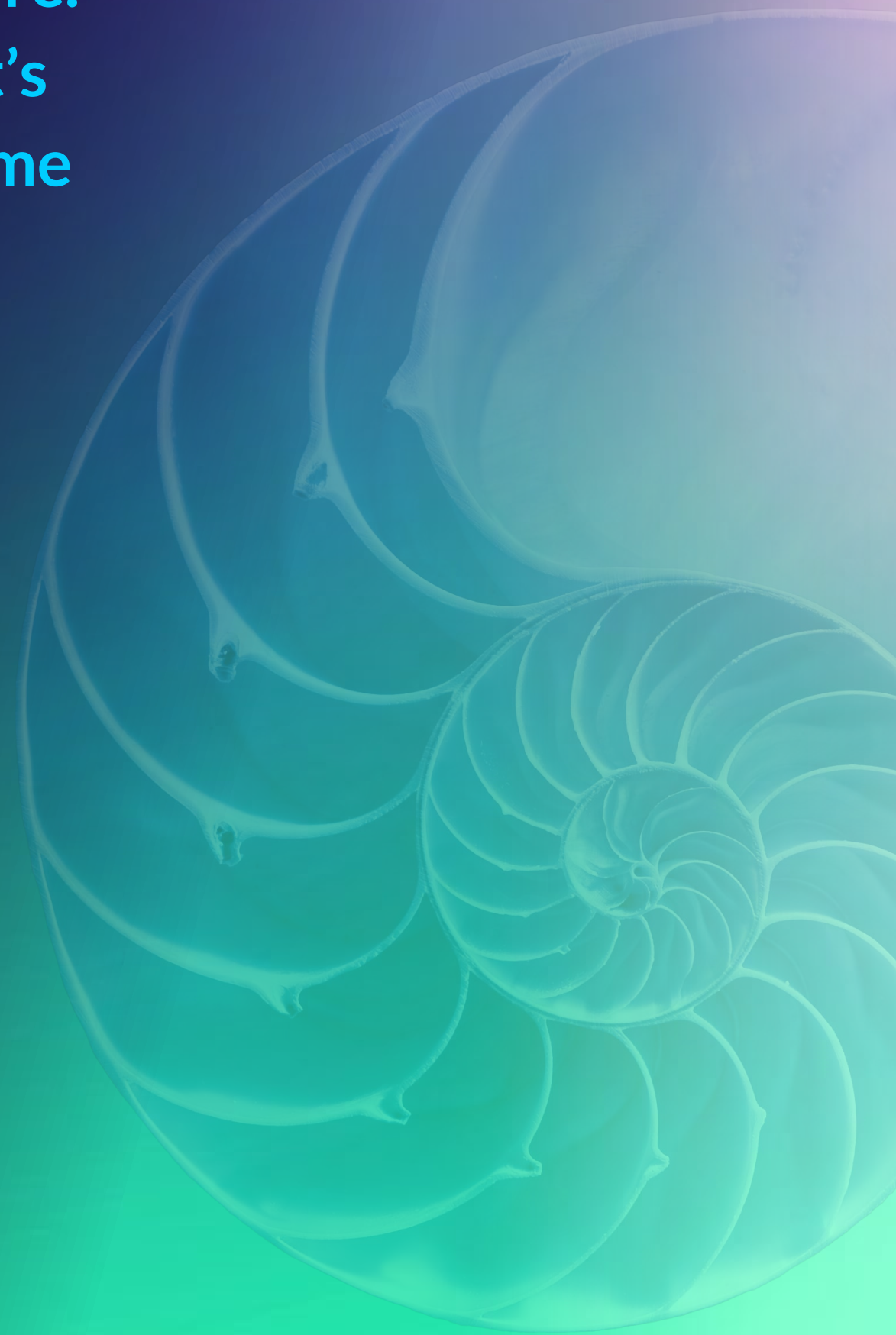
Compliance

The more work that comes in, the more ways you will need to comply, and the more compliance workload there is. If you don't know or can't be sure that you've ticked all the boxes, then it's a constant source of stress.

You probably know if there's a problem without asking the question. Perhaps you keep having scares, you've got stressed and over-stretched compliance teams, or you've even been found to be non-compliant. If any of those are chronic, you probably know already that something needs to change.

Either you or your compliance officers will know what's making life hard for them. It's likely the nature of the existing processes, volumes of work, or a combination. In choosing your solution, you should take a deep look at the problem and truly understand it, not just superficially. That way the solution you choose will treat the ailment, not just the symptoms.
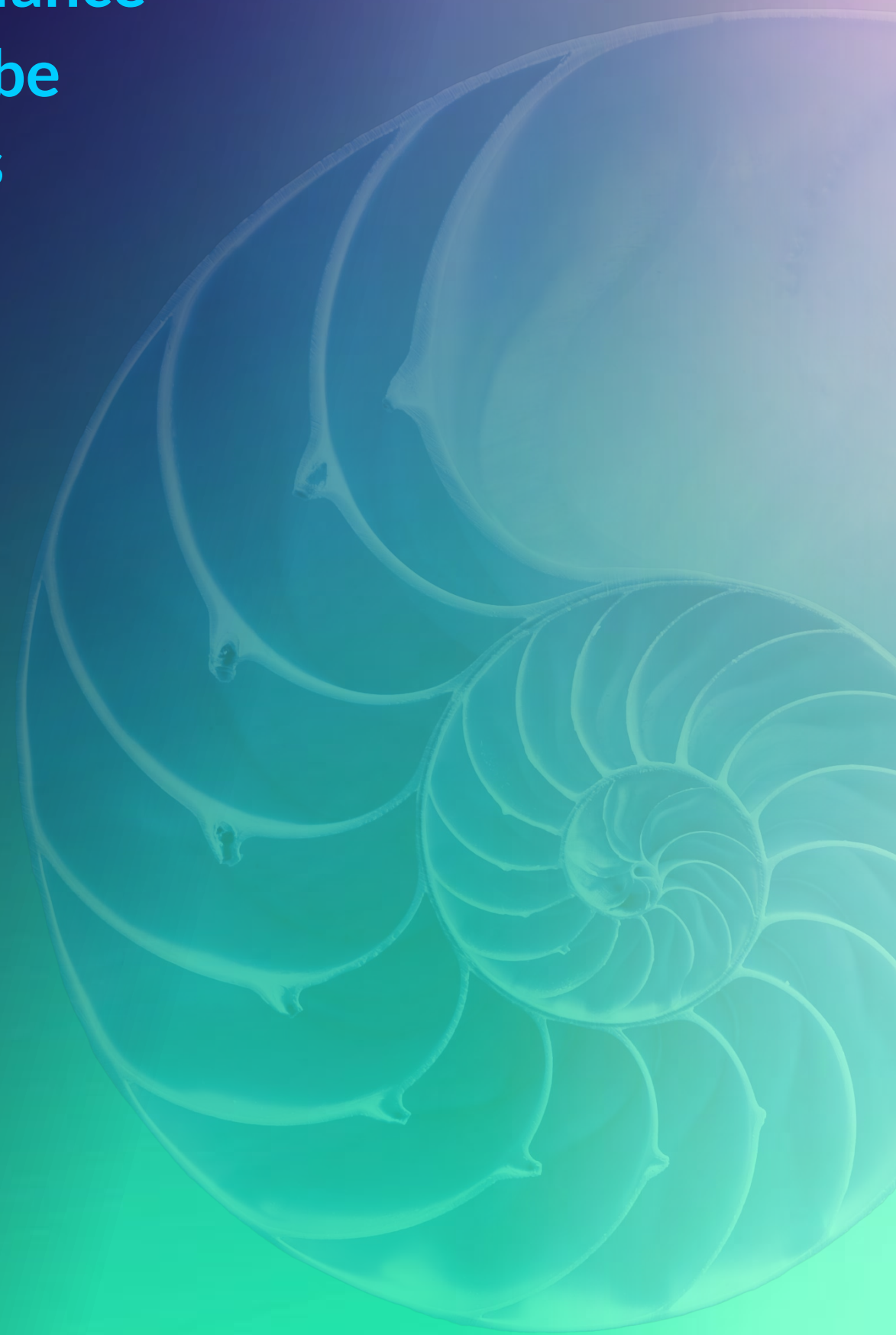
Data migration

When a hermit crab has chosen its new shell, it lines up next to it, exits the old shell, and climbs into the next. It's a seamless process, because the crab knows what it's aiming to do, knows how to do it, and has everything in place. Without that, it'd be a dangerous manoeuvre.

Much the same goes for data migration. It's understandable that a firm would be nervous about making the switch to new software. Data is the lifeblood of the practice, and losing it would be commercially ruinous. However, like switching shells, it's only dangerous if you're not ready. A good platform will offer conversion assistance, so you can hand over the data migration to an expert who can populate the new software with your existing data safely and quickly.

Searching for a new shell

If you think you might have outgrown the system you're using, there's plenty of **research material** at **insightlegal.co.uk.**

Read about how to use, measure, and **optimise** software, or understand and **overcome** the fears about swapping to a new platform.

For a no-strings-attached call:
Get in touch with Nathan

For more tools and tips for growing your practice: **Get more guides**

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