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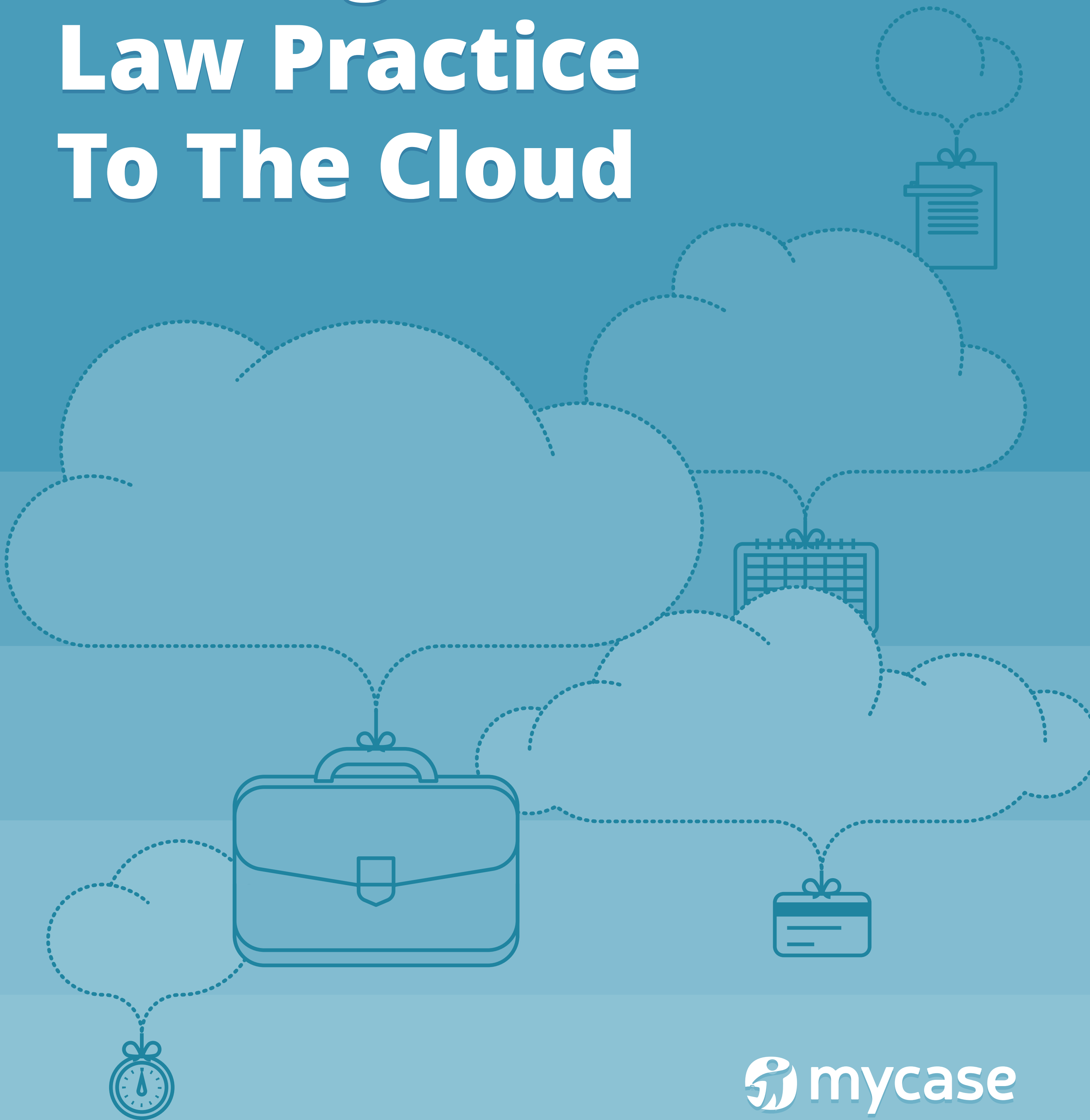
Moving Your Law Practice To The Cloud



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You've decided it's time to move your law practice into the cloud. You've researched your options and you've picked the perfect web-based law practice management system for your law firm. Now what? How do you go about making the switch?

In this white paper, you'll learn the easiest ways to transition to a web-based law practice management platform. Whether you're currently using server-based law practice management software, are switching from another web-based provider, or are starting from scratch, you'll discover that it's really not as difficult of a process as you might think.

Your implementation roadmap will vary

The path you'll choose depends on whether you are starting from scratch and are just hanging out a shingle or already have existing software programs ("legacy systems") in place.

Things to consider:

1. Does the software integrate with popular services, such as Outlook or Google Apps?
2. Does the company assist with data migration?
3. What types of data can be imported?
4. Can you integrate folders and/or batch upload documents or do you have to upload every document separately?
5. Does the law practice management software integrate and automatically sync with accounting software such as Quickbooks?
6. Can I send invoices to my clients through the system? Can my clients pay their bills online?

Starting from Scratch

If you've just recently hung out your shingle, starting with a cloud-based system from the ground up is often the way to go.

For lawyers just starting out, integrating cloud-computing platforms into your practice will be a relatively simple matter since you'll have invested less time, energy, and money into legal software programs. More likely than not, you're running your law practice using a hodge podge of programs including a word processing program such as Word, WordPerfect or Pages, a web-based calendar and email system such as GCal or a server-based program like Outlook. You may also be using cloud-computing platforms for e-mail such as Gmail.

Oftentimes, you'll find that many systems will automatically sync with other web-based programs such as Google Apps. So if you're already using those programs to store your contact information and documents, it's a simple matter to transfer your information in the web-based law practice management system by taking advantage of the integration between the systems and syncing the data at your convenience.

Once you've done that, you should be all set and transitioning to a web-based law practice management program will be an easy process. Simply sync your existing data into the system, dive right in and start inputting case information as you go.

Methods of integrating your data:

- Upload all existing data into the system
- Upload only select data into the system, such as contacts and frequently used documents and forms
- Upload only data from open files
- Upload data as new files are opened

Replacing or Supplementing Existing Systems

You've decided to move to a web-based law practice management platform and already have some type of practice management system in place. Either your firm has been around for years and you're currently using premise-based software, you're transitioning from one web-based practice management system to another, or your firm is a only a few years old and you're using a system cobbled together from a variety of free or low cost web-based software.

If your firm is already well established, you've no doubt been using the same software for years and recently decided to upgrade to a new practice management system so that you can take full advantage of all of the benefits that web-based law practice management offers. In that case, you will probably be replacing traditional desktop or server-based programs with a web-based law practice management platform.

Alternatively, you've already transitioned to the cloud but you're unhappy with your current law practice management platform. You've thoroughly researched your options and have decided to move to a new, more intuitive system that is better suited to your law firm's needs. Now it's just a matter of transitioning to the new platform.

Or, last but not least, perhaps your firm is just a few years old. You've jury-rigged a workable case management system using a variety of software systems but have decided to upgrade to a more efficient, tailored approach. In that case, it makes sense abandon your patchwork, stop-gap system in favor of a more efficient, well-designed web-based software.

Regardless of your situation, because you have existing software systems and processes in place (i.e., "legacy systems"), then your cloud-computing implementation process necessarily differs from that of a brand new law firm and transitioning to a web-based system will require a thoughtful analysis of your current set up.

The first step is to determine whether the current software you're using permits you to export data, and if so, in what format(s). It's also possible that your current provider may permit the export or syncing of some data, including contacts, documents, and notes, with other cloud-based platforms that your new provider also integrates with such as Outlook or Google Apps.

Next, contact your new provider and find out what they can do to assist with the data migration process. You provider should be able to walk you through the process and ensure that you understand the steps necessary to import all of your data into the system.

Once you are familiar with the import process, you'll be in a better position to assess how long it will take you to get your firm's necessary data into the new system. The time and manpower needed to import your firm's data will depend, in part, on the amount of digital data that your firm has accumulated over the years.

Now that you have an understanding of the import process, your next step is to decide how to go about transitioning to the new system. You have three options: 1) import all of your firm's data, 2) import only critical data, such as contacts and frequently used documents or forms, 3) import critical data and all data for open cases (some firms might also want to include recently closed cases as well), or 4) import only critical data and then input additional information as new cases are opened.

The particular option you choose will vary and there's no "right" solution. Every firm's situation differs and it's largely a matter of balancing personal preference with practicalities.

Practice more, manage less

Once you've chosen your firm's implementation path, make sure your entire law office team is on board and stick with it. In no time you'll be reaping the benefits of your new, more efficient law practice management system and your practice will be more efficient, more streamlined and less stressful.

You'll be able to practice more and manage less. Your clients—and your firm's bottom line—will thank you!

ABOUT THE AUTHOR

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Nicole Black is the Legal Technology Evangelist at MyCase, a web-based law practice management platform. She is an attorney in Rochester, New York and is the author of the ABA book Cloud Computing for Lawyers, co-authors the ABA book Social Media for Lawyers: the Next Frontier, and co-authors Criminal Law in New York, a West-Thomson treatise. She speaks regularly at conferences regarding the intersection of law and technology and can be reached at niki@mycase.com.

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