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■ TRAINING

Four Essential Steps to Success

Don't even think about new software without planning for training.

By Roberta Gelb

Has this happened at your firm? Ms. Big Shot on the executive committee hears from her third-cousin about a *fabulous* new software that slices, dices and bakes bread.

Actually, in this case, she's raving about a new CRM program (client relationship management software) that manages information about the firm's clients. She wants to buy it, *now*.

But before your firm even *thinks* about spending the equivalent of an island dictator's slush fund, as I.T. director, you need to take four steps to guarantee a proper return on investment (and protect your staff from blame!):

1. Conduct a needs analysis.
2. Generate "buy-in."
3. Create customized training
4. Establish metrics and document your return on investment.

1. NEEDS ANALYSIS: Before you endorse the firm's decision to pull out the checkbook, insist on a "needs analysis" that defines both the objectives for buying the software and how you will measure success.

Look to how the software can improve productivity; save time, money and resources; and even, in

some cases, improve the quality of the life at the office! For example, one concrete objective might be to increase the number of mailings to the firm's contacts from annually to quarterly without additional staff or overtime.

Conduct in-depth interviews with key personnel, run a few focus groups with key users and send off both paper and e-mail questionnaires. Evaluate how these tasks are currently handled, and solicit suggestions about enhancements (and wish lists) from the staff.

Soon, you'll identify the constraints and hidden resistances that will be encountered if you buy the software. Some staff may resist change in general; others may be reluctant to share information — an essential component of a successful CRM program. In particular, CRM software goes to the heart of a firm "culture," which often rewards those who hoard information. For CRM to succeed may mean a huge sea change in your firm's very underpinnings.

This is no small issue!

Finally, report your findings to your decision makers. A plan for handling and resolving the resistance can be developed if they decide to proceed. But if this is overlooked, every subsequent effort can be subverted.

During the report-back session, the group must determine whether the plan should be modified to address the concerns identified in the needs analysis.

A compromise may be to offer both a

public contact file and a private contact file, with the individuals controlling this decision. Alternatively, the executive committee may decide to veto that approach and find other ways to encourage the sharing of data. The plan must be determined before the next step.

Identify the hidden resistances you may encounter.

2. BUY-IN: The executive committee must generate consensus among all stakeholders. This usually requires a high-level champion who pushes the mission. You may need to bombard staff with meetings, memos, e-mails and

newsletters. Participation by the executive committee in training is critical (and reinforces the mandate). If staff, at all levels, recognize that they have no option but to participate, you'll get consensus!

3. CUSTOMIZE TRAINING: Customize the software to your firm's real-life needs. If it doesn't meet your firm's requirements, no amount of training will improve productivity or give you a significant return on investment.

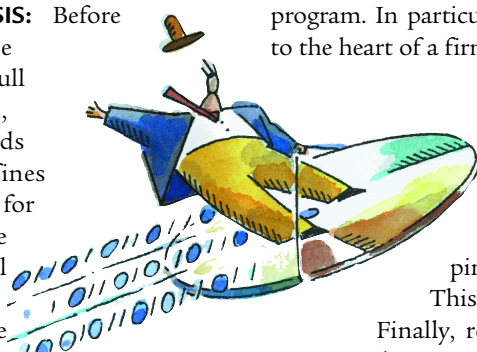
4. MEASURE SUCCESS: Metrics! Metrics! Metrics! Track the increases in productivity. Monitor those marketing mailings. Calculate time saved and money left over.

This will help provide ammunition and credibility for your *next* technology endeavor! **LFI**

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