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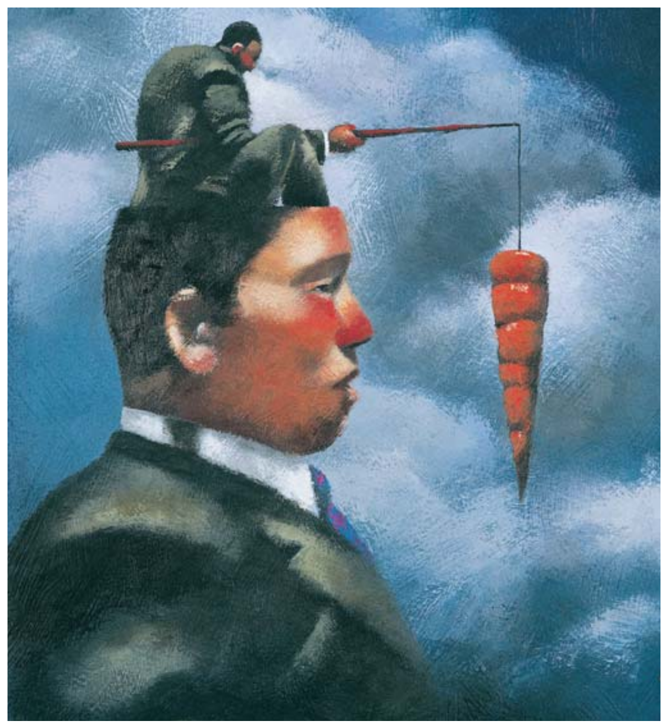
Marketing Technology

Selling the Buy

You convinced the firm to get new tech, now persuade your professionals to use it!



By Roberta Gelb

For months, you created and collected RFPs, brought in the vendors for hours of demos, painstakingly checked references, until you finally decided on the legal software package that was right for your firm — and convinced your firm's leadership to buy it. Now comes the catch — you now have to convince those lawyers, executives and support staff to actually use the new program, so they will realize all those benefits you promised.

Planning for legal software installations doesn't just involve the technical side, it also means marketing — yes, selling — the technology to your users. Here are six tips:

1. *Market it!*
Develop a public relations campaign. "Products don't sell themselves — they need to be actively marketed," says Christy Burke, president of Burke & Co., a New York based public relations and marketing firm. "Understand what motivates people. If you tell people how the software's features will benefit them directly in their everyday work lives, they will invest themselves in learning the new technology."

Burke suggests that you enlist the help of your firm's marketing staff — or the software vendor — to create effective communications about the new product. Hold demonstrations of the product, and don't forget the snacks and prizes — they work! Especially in the late afternoon.

For multi-office firms, online webinars are a handy tool. Demos should be well publicized and occur at least one or two weeks prior to onsite training. They will help you create a positive "buzz" about the product at the firm.

For example, in 2005, when Paul, Hastings, Janofsky & Walker was rolling out of Interwoven Inc.'s WorkSite document management system to its 1,900 users in 13 offices in the U.S. and Europe, they they faced a daunting challenge. They wanted to use "blended" training — combining e-learning, created by U.K.-based TutorPro, with traditional classroom learning.

But that meant that they were presenting their users with not just one, but two new technologies: the e-learning tools, as well as the new workflow software. So they had to market the new training method along with the new WorkSite system.

One technique they used was to insert trivia questions about super heroes within the software lessons, to keep the training entertaining.

The project team also took advantage of the firm's daily internal newsletter, prominently promoting the software as though it were a movie release, followed by a sequel: "Worksite Begins" — followed by "Worksite Continues."

Jeanne Marie Boswell, director of technology training, says that tying phases of the project together helped establish momentum. "We were repetitive in fresh ways, never boring, nagging or scolding," she says.

2. *Visibility from the top.*
For a successful rollout, you simply must have support from the firm's highest-level executives, as well as all other levels of the firm.

Says Paul Hastings' Boswell: "It wouldn't have mattered what we had done, if we didn't have the support of top management on every level — firm management, office chairs, office management."

If the firm's leaders are using the new technology, it will all but guarantee peer pressure, and a successful "trickle-down." By contrast, if the firm's top leaders don't use the new software, why should anyone else?

"When introducing new software, include the technical staff, but also include a user — someone who has been with the firm for a while and knows intimately how the firm does things from the support point of view," suggests consultant Frank Jones, of Legal Software Connection, based in Monroeville, Pa.

Jones has about 20 years' experience, and has done numerous installations of World Software Corp.'s Worldox document management software.

For large installations, Jones recommends that the firm establish focus groups, to provide a forum for the firm's users to make suggestions, feel like part of the process, and buy in to the installation.

"Decide whether you want to include your tech geeks or reluctant technophobics, or both," says Jones.

Include your training and help desk staff from the beginning. A common pitfall for the IT staff to forget about these folks until all major decisions have been made. That's a bad move, because your trainers and help desk are going to be on the front lines. Their insight into the users' needs can bring key information to the IT group.

3. *Know your users and train accordingly.* Your users probably fall into one of three groups: cheerleaders, fence-sitters, naysayers. If you train the naysayers first, they may kill your project. On the other hand, if you can convert them, they can become your best cheerleaders. Each firm is different so devise your own strategy.

Be careful about the order in which you train people, advises Jeff Tefelske, vice president of sales for Denver's Synaptec Software Inc., which creates matter management software, called LawBase.

The common wisdom is that it's always best to train secretaries and other support staff before you train lawyers and executives. But Tefelske recalls one firm that insisted that its attorneys be trained first. The firm's leaders explained that its support staff was extremely resistant to change, and predicted that after the training, they would give lawyers negative feedback about the software, saying it was a waste of money. By the time the attorneys got to training, they were highly confrontational and combative, picking fights with the trainer instead of learning the software.

It proved wise to train the firm's attorneys first. "By switching the training order, the result was exactly what the IT department wanted," explains Tefelske.

"The attorneys were impressed by the features of LawBase and went back to the staff raving about the new program and how much easier it would make their jobs. Their success rate in introducing new applications increased dramatically."

4. *Pilot groups.* Before you do firmwide training, test your system's nuances by setting up a carefully selected pilot group. Think of this group as the first people to come out of the theater after the new release of a movie. What would you like them to say?

Pick this group very thoughtfully, because they can make or break your project. Have the project team ask for — and listen to — the feedback. Everyone on the team needs to hear this feedback directly.

And there's always Jo Haraf's trick: have several beta test groups. The CIO of Morrison & Foerster, she typically invites a handful of practice groups to "beta test" her new rollout. The groups are usually flattered to be asked, and therefore participate with more zeal and detail, and their involvement (and word of mouth) helps Haraf generate buzz and critical mass of acceptance for the new endeavor.

Not everyone learns the same way, so offer a variety of training media: classroom, e-learning, reading materials, and one-on-one. In most cases, the best approach includes all those methods.

5. *Make it fun.* Be creative — but don't go over-the-top cutesy or you run the risk that your legal professionals will disenfranchise themselves from the project. Contests and other entertaining training methods can inspire users to participate, if done right.

For example, Boswell's team at Paul, Hastings created an interactive trivia game in which they interspersed software questions with pop culture questions. They held weekly trivia contests and ran a "USA TutorPro A Challenge" to reward offices that generated the highest participation rate. The grand prize was an Apple Computer Inc. iPod.

It was a big success, and about 25 percent of the firm's users took time to play the game.

At Jacob, Medinger & Finnegan, support staff were trained to use Microsoft Corp.'s PowerPoint presentation software, but to the chagrin of the firm, many didn't use it regularly, if at all.

To encourage users to keep their skills current, the training team ran a contest following the first phase of the training.

Each trainee (all women) was assigned to create a PowerPoint presentation on any subject.

Winners received a $25 gift certificate from Sephora, a San Francisco-based beauty products company.

"This was great and it really encouraged our people to use PowerPoint," said Rochelle Saferstein, Jacob's firm administrator.

"They put in so much effort that there was a three-way tie for first place. It was absolutely beneficial to have this contest and we are thinking about running more contests as we roll out new software."

6. *Metrics.* You're going to be asked to document your success, and the project's return on investment, so be sure to use benchmarks and metrics all along the way.

For example, at Paul, Hastings, 79 percent of the firm's users completed all or a portion of the e-learning training — 39,253 lessons were completed as of the rollout date! Those are tangible numbers you can take to firm management.

Your firm's software rollout can be a great success if you plan carefully. You can build excitement and credibility for the new product, and that leads to effective absorption of the new technology. If there ever was a win-win situation, this is it. **LTN**

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