



WHY YOU NEED TO DEVELOP A TECHNOLOGY PLAN

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I get a large number of calls about technology on the Pennsylvania Bar Association Hot Line. In fact, over 55% are focused on selection of hardware and/or software, or internet access and usage, or other networking issues. Not surprisingly, the overwhelming majority of callers are solo practitioners or attorneys from small firms. With limited resources to bring to bear, these practitioners must leverage themselves most effectively by utilizing technology.

At many mid-size and large firms it is common practice to develop strategic technology plans. With significant upgrade dollars at stake, it is important to carefully evaluate firm needs and plan for implementation over time. There is a misconception that the strategic planning process is unnecessary at the small or solo firm. Unless you want to pay for software you never use, or use and abandon, or invest in hardware which becomes a really neat electronic doorstop, it's important for you to stop and think about a few things before you put your money on the line.

The first step in developing a plan is to gather information by conducting an internal automation needs survey. If you are a solo, you should be asking yourself, your secretary, and key clients certain questions. If there are others at the firm, all should be queried. The over-riding question is what you do that you want to do better. Also, what can't you do that could be done through automation. You should set forth your expectations in terms of productivity, savings or increased revenues, and client communication and service. If you can, ascertain what your competition is doing. Take your time. Information gathering is a fundamental part of the planning process.

Once you have completed the survey process and have made your list of the types of functions you wish to perform with your new hardware or software, it is time to develop an implementation plan. There are obvious limits to the financial resources one can garner to buy everything at once. But even more precious is the time spent on training and navigating the learning curve of each new software

application. That is time diverted from getting the product out the door for staff, or in tending to client needs for attorneys. There's probably a greater limit placed on time available than dollar resources. For this reason, it is important to develop a game plan for achieving your automation goals over time.

Today's application software packages are just too complex to bypass training or ignore the learning curve. Even though computers and networking hardware have plunged in cost, we expect a lot more from our networks. Simple word processing and email no longer satisfy our needs. Today's requirements list is much more ambitious: network faxing, broadband internet browsing, document management, case management, database applications, and remote access can be found on nearly every RFP being issued today. That means more to be administered, and more training required for end users.

Once you've made your decisions about what you want to change and add, and how much training immediately and as follow-up will be required, it's time to determine the allocation of funds. Nowadays, your allocation should be something like:

- 40% hardware and software
- 35% integration/installation services
- 25% training

As you can see, training will require almost as high a budget as the actual hardware and software. In addition, your short term and long term plans should include a commitment of dollars for additional training. Studies have shown that even with accomplished trainers and attentive students, most people will only retain about 40% of the training presented. And that's on a "use it or lose it" basis. The longer one waits to put new information to use on the computer, the less will be retained. Therefore, training should always include a "refresher" component in the budget.

Given the financial resources, and the limited capacity of people to learn new applications while working a busy job, it is likely you will phase in software over time. So you must prioritize what you need most now, and the order in which you want to implement other packages. Is enhanced internet communication with clients most urgent? Document Management? Case Management?

It is important to prioritize at this point because a decision you intend on making down the road can impact what you buy now. If you plan on purchasing a case management system, for example, it may strongly influence what time & billing package would be appropriate. It can also influence which brand of Personal Digital Assistant (PDA) will work for you. Some case management systems have



built-in time & billing capabilities, others are designed to integrate with specific outside systems. But you certainly need to know that before you buy a time & billing package that is “unfriendly” with the case management system you fall in love with later.

Is litigation support and image management in your future? If so, you must be careful of the hardware platform you put in now, so that it will meet your needs as you add this additional capability later. This includes your cabling, which will need to be replaced with Category 5 to handle the necessary traffic at reasonable speeds.

Keep focused on what you want to accomplish, not what application you should buy. The lines have blurred to the point where one can do spreadsheet graphs in database applications, database management in spreadsheets, time & billing in case management, faxing from a word processing package, and so forth. Go to the internet site of possible vendors and do a “test drive” of their packages. Pick what WORKS and MAKES SENSE to you. You can examine two packages, equally well written, and one can make no sense to you, while the other can seem intuitive and a natural extension of your current procedures; the Shangri-La of software. That is what you’re looking for. And that’s why it’s important that YOU check it out, rather than pick something sight unseen which another attorney likes. It may not work as well for you as it does for someone else, because your method of processing information may be very different.

Because today’s networks and applications are much more complex, you will need some support on an on-going basis. This might mean a support contract with an integrator, a consultant you pay hourly when needed, or a part or full-time staff person, depending on the size of your network. Hardware maintenance contracts normally run about 15% of your initial cost each year. Identify the costs for support and hardware maintenance for the coming years, and determine what additional financial resources will likely be available to carry out the balance of your automation plan. If the resources are inadequate, rethink what is included in your plan. If you make cuts, make them proportionately in all three areas of your budget. It will be tempting to cut only training, but doing so will guarantee you will not receive the expected return on your investment.

The remainder of your plan concerns implementation planning and document conversion strategy. These are best developed in conjunction with the selected vendor. Don’t scrimp on dollars budgeted for macros if you are switching word processing packages. Note that your need for well-written macros may determine your actual choice of integrator. And be sure to perform test conversions on



samples of your actual documents to ensure the result is satisfactory. You should not find out your documents are virtually unusable format-wise AFTER you've imported all of them into the new software, and need to quickly get work out the door.

With proper planning you will achieve the maximum return on investment for your technology dollars, while leveraging the productivity and knowledge-base of yourself and your staff. You will position yourself to take advantage of emerging technologies in an orderly fashion, without being overwhelmed at the volume of information you must learn. And you and your partners will feel COMFORTABLE with the choices you have made, knowing you have spent the firm's hard-earned dollars wisely.

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