



Why now is the right time to move to
THE CLOUD



Contents

04.	INTRODUCTION
05.	THE BARRIERS TO SUCCESSFUL CLOUD ADOPTION
09.	WHY NOW IS THE RIGHT TIME TO MOVE TO THE CLOUD
11.	BUSINESS BENEFITS OF PRACTICING LAW IN THE CLOUD
15.	10 QUESTIONS TO ASK CLOUD-BASED LEGAL TECH PROVIDERS



Introduction

For law firms, the decision to move to cloud-based practice management and productivity software is rarely taken lightly. There are many change management, business disruption and cost considerations. And perceived barriers regardless of what technology you currently use, what kind of firm you are or how big your firm is. Finding the elusive "right time" to switch to new systems can mean decisions get put on the back burner for months if not years.

However, now that so many of us are facing enforced remote working due to COVID-19, firms are having to make quick decisions to get cloud-based software in place that helps them get up and running remotely, fast. How have they been able to work through the perceived barriers and make these decisions?

The 7 barriers to successful cloud adoption

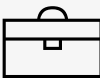
We have been moving firms to the cloud for over 15 years and understand the perceived and real barriers. Generally, what firms see as the barriers to move to the cloud fall into 7 categories.

Change, Competency, Complexity, Compliance, Confidence, Control and Cost.



Change

It's ok to be apprehensive about change, but to move forward and operate successfully in very dynamic and difficult market conditions it is essential to get comfortable with change. Cloud software gives you more flexibility, more up-to-date technology, more access to talent, more collaborative systems and more control over your firm's data and costs. So the benefits of change are very compelling.



Competency

Competency is a barrier to cloud adoption because moving from a familiar but out of date technology infrastructure to a cloud model often requires you to adjust skills in your team. Some of those in your team will actively promote the status quo in order to protect their turf. No doubt, they will be excellent at coming up with reasons why you should not make the transition (many of those listed here!) but competency is not static. People learn, they adopt, they will see the benefits after the change has happened.



Complexity

For firms that have a complex technology set-up, with multiple systems or a number of data sets, the perceived complexity of migrating everything into another system can be a barrier to change. How hard is migration going to be? How accurate will the data migration be? How will data sets be merged? This is a core skill-set for many cloud providers and their IT consultants who use tried & tested data cleansing processes & data mapping tools for migration. What about integrations to third party systems? What about the systems I currently use, rely on, love today – will I still be able to use them? In most cases moving to the cloud will actually simplify not just integrations, but your whole technology environment and reduce complexity.



Compliance

Compliance is an incredibly important consideration before adopting a cloud model. Local, state and federal government, healthcare providers and financial institutions are just some of the verticals which have very demanding restrictions regarding data gravity, locality, retention, and security. So it is crucial to check documentation and compliance very clearly and read the Terms of Service of your cloud provider. Reputable firms will already address these requirements.



Confidence

Confidence - or a lack of it – is a major barrier to cloud adoption. Moving to what is seen as an emerging technology and the changes associated with it can result in firmwide panic. But worse still is the decision to do nothing. The cloud isn't going away. It needs to be embraced if you plan to maintain a competitive edge. Your confidence can be increased by doing due diligence: Review references of different cloud providers, research if there have been any data breaches, look at customer feedback. Most cloud providers take this very seriously as one error and their reputation and business model could be destroyed. Many governments now mandate the use of the cloud for services and conduct detailed compliance and certification tests for these.



Control and Cost

Control & cost are interlinked barriers to cloud adoption. IT staff or Firm administrators are used to having complete control of their infrastructure, apps, data and services. Business leaders need to control costs and ensure that costs are predictable and repeatable. The simplification of your technology environment by utilising cloud technologies is likely to reduce Total Cost of Ownership of technology and give firms much better control of firm data and how your teams access and utilize technology.

58%

Cloud usage was at 58% in 2019 among law firms. Solos and small firms continue to lead the way. American Bar Association

#1

A recent report by the International Legal Technology Association which surveyed 537 law firms, representing 116,000 attorneys, ranked cloud as the number one technology trend they believe will create "significant change or be a major factor in the legal technology profession."

2x

Small businesses are twice as likely as larger companies to have implemented cloud-based backup and recovery solutions that save time, avoid large up-front investment and roll up third-party expertise as part of the deal.

73%

According to one study, "73% of knowledge workers collaborate with people in different time zones and regions at least monthly".





Why is now the right time for a move to the cloud

We know many firms are facing enforced remote working amid the COVID-19 pandemic. For firms that are already in the cloud, they can focus on building great team collaboration and client communication rather than struggle with system access and performance.

For the majority of firms that are not in the cloud, it is a real struggle to get up and running remotely. Some firms may have "work-arounds" like VPNs or hybrid-cloud log-ins which at least allow them to access their data in the short-term. However, legal technology has evolved rapidly over the last 10 years. Many of the "work-around" systems that Firms have in place are not fit for today's standards of security and connectivity. Cloud-based systems offer much more security and allow people the full breadth of functionality they need to do their jobs well.

We know, technology is not the only aspect firms are struggling with. People are working from home indefinitely, sometimes in less than ideal environments. For many, this is a completely different way of working – adopted overnight. Team collaboration, information sharing and morale can suffer unless you are used to operating this way. So, for these firms, it might not feel like an ideal time to change IT infrastructure with so much other change occurring. But when is the right time? How are you going to keep managing through this crisis without making a change? Is your goal to just get through it, or to use the time to position your firm well for the future? We don't know how long it will last. And when it's over, being ready for the next unpredicted crisis will be even more valuable.



Why Now?

Business Benefits Of Practicing Law In The Cloud

Work from anywhere

When you are in the cloud, if you've got an internet connection you can be at work, wherever you are using an internet browser. Today, that flexibility to be able to access your full systems and work effectively with your team is the difference between surviving & thriving. And the best cloud software providers offer mobile apps, or full system access via tablets or phones also, so you're not restricted by which device you've got to hand.

Staff Training & Succession

Most firms say that their value to their clients comes from the quality of their work and the quality of their people. This doesn't fare well when people leave or transition to retirement. It can leave gaping holes in knowledge and skills. Having processes that work, are replicable and consistently create great client experiences is crucial to growing a practice, increasing your firm's value and building a reputation for excellence in your market. Cloud-based software allows you to build these processes into your software so that new staff training and handover is easy. Customising your technology like this will also open up options for succession planning, as others can pick up ongoing work and follow the processes being used. If you go to sell your firm, your processes, built into your technology are evidence of your IP and value to potential buyers.

Collaboration

When your teams (and clients) can access, edit and share documents anytime, from anywhere, they're able to do more together and end up with a better result. Cloud-based workflow and file sharing mean your team can access the same document, work on it together or with clients in real time and have full visibility of the contributions of each person in one document.

Document Control

With the ability to access and collaborate on documents, comes the greater the need for watertight document control. Before the cloud, workers had to send files back and forth as email attachments to be worked on by one user at a time. This regularly ended up with a mess of overlapping versions, variations of content, and confusion over which version was the most up to date. When your document management is cloud-based, all files are stored centrally, version control timestamps each change and tags it to the author, so there is only one version of the truth.

Attract Legal Talent and Staff

Whether you are a smaller firm thinking about succession planning or a growing firm that needs to build your team, attracting and retaining talent is crucial. Younger lawyers and staff have grown up being online and using mobile devices. They expect to be able to access work and information systems in the same way. The concept of having to use a designated Windows machine with special software installed is alien to younger generations. They want to work for progressive firms with the flexibility of remote access. They are also more aware that any other generation that having the right technology in place can protect their productivity and protect their jobs in tough times.

"Today, the flexibility to be able to access your full systems and work effectively with your team from anywhere is the difference between surviving & thriving. "

Stay in Step with Microsoft 365®

If, like most lawyers, you spend a lot of time in Microsoft Office, you need a system that can stay in step with Microsoft's cloud strategy. Your practice management system should integrate well with Office and Outlook so that everything you do works across systems. But unless your practice management system is fully cloud-based, it won't stay integrated for long. This is because Microsoft's strategic direction has clearly shifted to the cloud with Microsoft 365 and Online. By adopting Microsoft 365, lawyers and staff automatically stay up to date with the latest versions of Outlook and Word and can use the online versions of those applications. With that in mind, in order to stay in step with these Microsoft products, you need a practice management system that is already in the cloud and integrated with Microsoft 365.

Reduced Cost

Moving to the cloud means you don't have major hardware costs eating into your capital expenditure budget. You'll have a predictable monthly fee on a subscription-based model that's kind to your cash flow. Project set-up & training costs are also generally much lower because and can usually be financed. In fact, the upkeep for on-premise solutions - both the Annual Maintenance Plan and hardware upgrades and maintenance — can end up costing more month to month than cloud-based practice management systems.

Disaster Recovery

The cloud helps businesses of all sizes have robust disaster recovery in place. With on-premise or "Hybrid-Cloud" systems, firms rely on a routine of backing up your computer's data to a nearby external hard drive or server. The risk is that your PC, local backup drive or server could be lost to theft, cyber-crime, flood, fire or natural disaster. With a fully cloud-based system, your data and information are automatically backed up to an offsite repository that never goes offline and is available from anywhere, preventing catastrophe.

Ready for the future

Fully cloud-based practice management systems keep your firm future-ready by routinely updating their technology and security systems. This makes sure your firm is compatible with the latest versions of Microsoft 365 and all the other online tools lawyers use. It also means that as new features are developed and rolled out, your firm automatically receives them, rather than having to schedule a designated "upgrade" with associated downtime. There shouldn't be any business disruption required to stay on the most up-to-date technology. You can stay focused on your business with the knowledge that you are on the best technology for your firm's future.

Security

Sometimes people feel that if the data is saved nearby, it is more secure. In reality, data saved to the cloud is much more secure than on a local server because reputable providers will have bank-grade data encryption and regular independent security audits in place to prevent unauthorized access or alteration. Another major benefit is that if someone in your firm loses their laptop, no-one outside the firm can access its data without knowing the passwords. The laptop's data is stored in the cloud, your team can access it no matter what happens to the machine. And you can even remotely wipe data from lost laptops so it doesn't get into the wrong hands.

Competitiveness

Moving to the cloud gives your firm access to enterprise-class technology that previously only the elite few could afford. The agility of cloud software gives firms of all sizes an edge over competing firms that are still tied to on-premise technology. Cloud software gives you more flexibility, more up-to-date technology, more access to talent, more collaborative systems and more control over your firm's data and costs. So, your firm can evolve, grow and even disrupt the market with new law firm models, while remaining lean and nimble.



"We were using a very archaic system with Time Matters. Since Actionstep is completely cloudbased and accessed via a browser we were able to deploy it to all our remote locations without the need of installing and maintaining software. It was the best move we ever made."

Ozzy Ornelas, Hupy and Abraham, s.c



Is it really in the cloud?

If you are looking at cloud-based software for your law firm, you have no doubt researched and found many options and providers for managing your law firm in the cloud. But how can you be sure the systems you are considering are fully cloud-based? (And does it really matter?)

The word "cloud" can be used loosely by some software providers. Combined with lots of images of clouds, web-screens, laptops and wi-fi – you could easily assume the software you are considering is a fully cloud-based solution. However, not all cloud providers are the same.

Some "cloud" providers simply host your local on-premise server for you and allow you to access it via Terminal Services (aka Citrix). Others provide a "Hybrid-Cloud" or "Smart Client" solution where you still need to install Windows software to use the application.

A true cloud application is accessible to users through any browser on any device (Mac, PC, iPad, Android tabled, etc) from any location without requiring any browser plugins or local software to be installed. Ask providers to be crystal clear about whether they are truly in the cloud or not so you can make informed comparisons and understand the real benefits to your business.

10 Questions

to Ask Cloud-Based Legal Tech Providers

Once you are sure the systems you have shortlisted are truly in the cloud, how do you assess which system is best for your firm? Each law firm has a slightly different criteria – we have highlighted some key questions to help you decide:

1. CAN I CUSTOMIZE THE SYSTEM TO SUIT MY FIRM?

Every firm has its own ways of working and a certain amount of mandated practice, regulatory or court related processes. Ideally, the cloud-based system you choose will allow for customization and process modification to suit the needs of your firm and areas of practice.

You will notice that many cloud systems aimed at solos and small firms tend to have limited customization capabilities. If you are migrating from another system that has been customized over the years, you will need a cloud-based system that accommodates these customizations and can migrate your firm across to the new system without loss of data. Make sure that the custom fields map from your old system to your new one through custom data collections. With this in mind, you should look at cloud systems that provide a high level of customization for complex or unique processes or for larger firms with multiple practices.

3. DOES THE SYSTEM HAVE EQUIVALENT FEATURES?

Every firm has favourite features or tools you can't live without or don't want to lose when you migrate to the cloud. And why should you have to? Some cloud systems have very limited features, so always identify your must-have features and only consider cloud systems with equivalent features.

2. CAN THE SYSTEM AUTOMATE MY WORK AND ADMINISTRATIVE PROCESSES?

Process automation is the key to creating efficiency at your firm. Look for cloud-based providers that have a mix of built-in and customized workflows to underpin automation.

Many providers talk about workflow. Workflow defines the steps, tasks and timing of any process to automate how things are done at your firm. When workflows are set up to your specification, you can collect information, assign tasks, track progress, get updates, update clients automatically and make sure everything is done and checked off before moving to the next step. Beware of providers that simply label set system process "workflows". Ask providers to explain what they mean by workflow.

4. DOES THE SYSTEM INTEGRATE WITH MICROSOFT 365?

Microsoft uses a newer and different technology for integrating applications to Microsoft 365. If you want a seamless integration between your cloud practice management system and Microsoft products then you need to select a provider that has a true "cloud-to-cloud" integration with Microsoft 365.

5. DOES THE SYSTEM INCLUDE ADVANCED DOCUMENT AUTOMATION (OR DOCUMENT ASSEMBLY)?

Repeat entry and copy / paste processes are a thing of the past – they waste time and carry significant risks of error. Look for cloud systems with a robust document automation capability. This will allow you to bring client and matter information into precedents, forms and other templates. Ask providers if you can merge an unlimited number of custom data fields. How do they handle pronouns? Do they also have constructs like repeat blocks (to dynamically create tables), and conditional logic to allow you to selectively substitute text and clauses in your documents?

7. DOES THE SYSTEM HAVE THE OPTION TO INCLUDE GENERAL LEDGER ACCOUNTING?

If you're going through all the trouble to change practice management systems, it's a really good time to also update your accounting system. If the cloud provider has a general ledger accounting module, this will give you one system for your practice management, billing and accounting. No need for something like PC Law. Alternatively, look for cloud-to-cloud integrations with accounting products built to integrate with multiple providers.

9. CAN I DOWNLOAD MY DATA TO USE IN OTHER REPORTING TOOLS?

Look for cloud providers that allow you to periodically download a local copy of your data for custom reporting, dashboards and data visualization using tools like Microsoft Power BI.

6. HOW WILL THE PROVIDER CONVERT MY DATA INTO THE NEW SYSTEM?

Ideally find a cloud-based system that has a purpose-built conversion tool to automatically transfer your current data into the new system. Without this you may be in for a long and expensive manual migration with the risk of human error and data loss.

8. CAN I DOWNLOAD MY DATA AND DOCUMENTS WHENEVER I WANT?

When you move to the cloud your data and documents are no longer stored on your local server. Choose a cloud provider that allows you to download a full backup of all your data and documents whenever you want. Other than simple peace of mind, this allows you to move to a new software provider in the future if you wish to.

10. MOST IMPORTANTLY: DO YOU LIKE USING IT?

Once you are happy that you have found the cloud-based providers most suited to your firm, the best assessment of any system comes from trying it out so you can see how your data would look and how the system works. Ask the cloud providers you are considering for a demo. See if you like using it and if you can imagine using it everyday. And remember – if they are truly in the cloud, they should be able to give you access without installing any software and simply by logging in through a browser of your choice!

COME UP TO THE
CLOUD WITH
ACTIONSTEP



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