

EMBRACING A NEW PMS

Users of your new practice management system will need to come to grips with the new skills and mindset required. Here are a few tips for a smooth transition.

If you are thinking of acquiring a new practice management system (PMS) or have recently acquired one, it is important to understand that selecting and rolling out the system is only half the challenge. It can be a substantial waste of time and money to pick a PMS based on its extensive functions if those functions never get properly incorporated into the way the firm operates. Merely making the functionality available is not a guarantee that it will be adopted by the users. Ensuring that the users of your new PMS, at all levels of the firm, embrace the change and come to grips with the new skills and mindset required to work within a new system is an important part of the acquisition process.

Based on my experience assisting three firms transitioning their practice management and document management systems, the following are some tips for ensuring the change is embraced.

Sometimes you have to go backwards to go forwards

When we learn a new skill or process, we are going to be the least competent at the beginning. The more we practise, the better we become at it. Despite this, people frequently get very frustrated, when being forced to do a task differently from how they might have done it previously, at how much slower it might be doing it the new way. They then use that as the basis to justify that the change is bad, that they prefer the old way and resist learning the new skill. Ensuring that everyone is prepared to expect it might take a little time to become proficient can help.

Be prepared to experiment or test-run the firm's processes in the new PMS

If a new PMS offers a process that is quite different from the way the firm has run that process before, there can be resistance, particularly at partner level, to an immediate and wholesale change of the process. Given the impact any inevitable initial slowness might create for the firm, there can be good cause for the resistance. However, that shouldn't then be used as the reason to ignore the new process entirely. The solution is to trial using the new process, not only in a dummy environment but also in a real environment in a controlled and discrete way. When charged at one of my firms with the task of transitioning the firm to the use of an existing but unused document management system, I first spent six months using the system solely within my own practice and within my own team in order to figure out what worked, what work arounds were needed and how best to roll-out the system into the firm's broader processes. That ultimately made for a much smoother and less impactful transition on the firm.

Don't be afraid to start again with practices and procedures

Frustration can arise with a new PMS not living up to the marketing promise but the reason might be because the firm has simply tried to plug the system into existing practices and procedures. For example, a PMS may have an efficient and paperless billing system which is ignored or only partly used because partners prefer to engage in their own (often hard copy) billing process. If the firm wants proper return on investment on the system, someone needs to devise a new procedure, perhaps even by starting the process from scratch, and then everyone, especially partners, needs to be made to use the new procedure.

Don't provide the option of being able to still do things the old way

The only way to stop leaning on training wheels is to take them away. Otherwise, you'll never properly learn how to ride a bike. If the old system is left intact and people are able to ignore the new system and keep doing things the way they've always done them, many will find the temptation of familiarity too much. Take the temptation away.

Close scrutiny sometimes reveals cracks you didn't see before

A phenomenon I have encountered when using a new system is that it can create a focus on problem elements of the firm that might have been glossed over before. For example, in one of the system roll-outs I was involved in, an amount of intensive work on new invoice templates then uncovered a GST accounting issue. The issue had always been there but the new system got the blame. Be aware that the adopting of a new system may uncover issues even if those issues are not new. That is good for the firm and a fringe benefit of acquiring the new system.

Revisit the training

Most people don't retain all that is imparted at the initial training with a new system. Over time, they just figure things out themselves and can end up using the system a certain way, whether it is the right way or not. Organising follow up refresher and advanced training sessions can be a good investment of time and money. ■

Peter Moran is principal at Peer Legal.

