circle
MANAGEMENT GROUP

From Selection to Signoff

How a Leading Estate Planning Firm Selected and Implemented Cloud-Based Document Management.

Client: The Blum Firm

Profile: Leading Estate Planning, Trust, Tax and Probate Practice

Result: Successful Selection and Migration to Cloud Based Document Management System

"It's been a wonderful and easy process working with them through this transition from start to final signoff." – Kathy Hamilton, Director of Business Development & Attorney Recruitment

Finding the Right Partner

The process of evaluating technology for a law firm can be an exhausting process. Many firms begin their search for new software on their own and often at the expense of their staff's time, effort and energy. Then they sometimes discover that the product they selected was not the right fit in the long run.

When The Blum Firm decided they were ready to transition away from their current platform, the team made the decision to approach the process in phases. The first step was to find a consultant who would scope and document the needs of the law firm and then recommend products that would meet the firm's requirements.

When speaking with Kathy Hamilton, Director of Business Development and Attorney Recruitment, she shared how the firm found the right partner:

"We began our search by looking for companies that worked with law firms, then investigated consultants. Circle Management Group was a clear fit because they had such an extensive background working with law firms and we were confident that they could take the project and run with it."

The Blum Firm selected Circle Management Group (CMG) for the discovery and investigation phase as well as implementation. CMG Partner, Kelly Plunkett, was the lead consultant assigned to the firm and she guided members of the law firm through the scoping and selection process which was focused solely on choosing a document management system.

Motivation to Move

Any investment in technology is not a decision that should be taken lightly or rushed. There are several motivating factors that drive law firms to switch or replace software. For The Blum Firm, a driving factor was that the current system began to exhibit signs of a mismatch due to limitations of the structure the law firm needed in order to support and scale the business. Additionally, the system began to slow down and did not have a network of consultants or support professionals to remedy ongoing issues. That was a combination that left the team with no other choice but to change providers.

Success requires Experience

A statement Kathy Hamilton shared during our interview hits on a very important point and one that directly impacts the success of any law firm technology implementation:

"Other consultants were familiar with software but not with law firms."

The team at Circle Management Group has a history of serving law firms that spans the course of nearly three decades. Because of such extensive experience working within the legal community, the team has developed both a process and a set of standard requirements that align with the needs of their law firm clients.

The Circle Management Group Process

There is a process that was developed by the CMG team as a collaborative effort. Each consultant and partner takes their personal and professional experiences into account to make the selection, implementation and training process better with every project they carry out.

As a result, CMG has developed a strong reputation for being a provider that can scope and implement at a fixed project price. This is a practice that is not found with many providers,. Instead, firms are often blindsided with change orders, additional consulting fees and unexpected project costs that complicate the process. By taking the time up front to scope and observe how a law firm operates, identifying the correct product-client fit becomes clear.

From Selection to Setting a Project Timeline

The Blum Law Firm, together with CMG Partner, Kelly Plunkett, made the decision to adopt NetDocuments which is the leader in cloud-based document management for law firms. Blum then formed a small team to work with CMG and weekly conference calls were put in place to demonstrate functionality as the project moved forward.

A Consistent Process Delivers Consistent Results

For anyone who has ever worked with a consultant, there are defining characteristics that demonstrate success, organization, communication and planning. CMG's weekly conference calls with a law firm's project team follow a structured implementation path for successful and on-time completion.

Process Milestones

Each of the phases below marks a point of completion in an overall project timeline. By following this process with every CMG client, the team can address and solve potential challenges with an implementation before the technology is released firm-wide.

> "Kelly and the CMG team walked us down the path hand in hand until we got to the point that we could use the system on our own."

Decisions Needed	Product selection, number of licences, user access, permissions and security controls.
Approvals Required	Identify the correct person for sign offs at each project stage.
Sample Data Testing	A sample of the law firm's data is imported into the new solution for testing.
Test View and Approval	A meeting is held to review the structure of data within the new system by key members of the law firm team for adjustments and changes.
Data Refinement	Requested adjustments and changes are made and approved.
Migration and Rollout	Full data migration is completed and users are added to the system.
Team Training	A series of training calls are conducted firm wide, specific to role or job function.
Project Signoff	The law firm team confirms the completion of the project.
Ongoing Support	CMG provides additional support on an on-going basis.

In Summary

Kelly Plunkett and the Circle Management Group team are known for thorough attention to detail and the ability to execute complex technology implementation and migration projects for law firms. As demonstrated by The Blum Law Firm's experience working with CMG, there are few organizations that have dedicated their business to serving the legal community with such proven results. Law firms that are ready to evaluate their technology options will benefit from the experience and knowledge of consultants who have worked in the trenches long before cloud technology was available.

For more information or to schedule a consultation with the Circle Management team contact us at clientsuccess@cmgconsultants.com.