



Nail it! DMS Success with the Best Deployment, Training, and Support



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Award-winning iManage partners provide a packaged solution for guaranteed Work 10 adoption

Even though your law firm has under 100 users, you are bound by the same demands, as well as risk and compliance requirements, as large law firms (e.g., same quality, ethical obligations and reporting requirements). Yet, you have fewer resources. In this situation, how can you compete?

You have already taken the first step by deciding to change how you manage your documents. Whether upgrading your document management system (DMS), or implementing a DMS for the first time, you need a modern solution. Your best choice is iManage Work 10, a competitive work product management solution that can offer your users the same best-in-class technology that is used by the Am Law 100.

Specifically, Work 10 can provide a great user-experience and firm-wide gains through the following benefits:

1. Improved productivity and collaboration, through fully integrated document, email and records management
2. Robust security built on a layered defense
3. Mobility through consistent user experience on phone, tablet, or desktop

Yet, even with the selection of a competitive DMS, how do you ensure high adoption of the new technology, a return on your investment, and overall project success?

The successful adoption of any new technology depends on many factors that influence the entire adoption life cycle: consistent and efficient deployment, effective change management and training, and 24/7 post-implementation support from experts. On your own, it is hard to handle all of these implementation facets.

This is why iManage, Olenick, Traveling Coaches

and Frontline Managed Services – four award-winning vendors to Am Law 100 firms – have come together to deliver a one-stop solution for your DMS implementation. They have put together Packaged Success – a groundbreaking, flat-fee offering for small firms to ensure iManage Work 10 is adopted successfully.

Benefits of Packaged Success

For IT

Simple Plan

One contract and seamless transition across three specialized providers

Affordable Price

Low, fixed price for the entire package of services

Small Firm Experience

Knowledge of critical success factors for small firms

Extended IT Team

Additional IT support that enables you to focus on operations and other priority initiatives

For Legal Professionals

Improved Productivity

Modern technology that allows you to work how, when and where you want

Maximum ROI

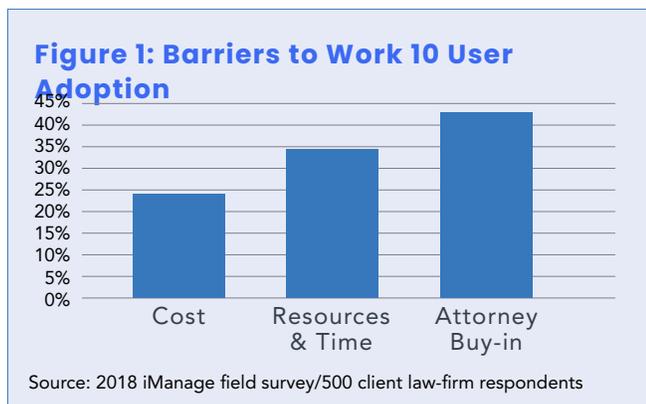
A programmatic approach to learning that empowers you to use Work 10 effectively

24/7 Support

Around-the clock answers to your questions, delivered by industry experts

What Makes the Path for Adoption Difficult?

It is not enough to have purchased a new technology for your investment to be successful. Success always depends on user adoption. For example, as iManage field research shows, the number one barrier to widespread DMS adoption is attorney buy-in (Figure 1). Once you have purchased Work 10, how are you going to secure widespread buy-in? You need to focus on the second phase of your project, which involves deployment, training and support.



Tackling deployment, training and support with internal resources can be a daunting challenge:

- How do you ensure that the software is consistently deployed and works on all desktops?
- How do you convince your legal professionals to use the features that will help drive greater efficiency and productivity, while providing the security and compliance that clients are demanding?
- Can you provide 24/7 live support so your legal professionals meet their deadlines?

Packaged Success Can Pave the Path to Adoption

A well-adopted and satisfied user community requires more than a well-executed design and go-live plan. To ensure high user adoption, you need to educate and support your users through the change management process. Work 10 becomes real for your legal professionals only when they can see the benefits of the update in their workflow. This means that they have to be sure that adopting the new technology

will make their life easier. At a minimum, they need to have the software working on their computers, but for a great user experience, they also need to have training on how to use the tool and 24/7 support in case they experience any issues.

The best solution is to have industry experts for each of these areas of the adoption lifecycle. Historically, this solution has implied that small law firms would have to engage and manage multiple partners, one for each of the adoption phases. Engaging multiple partners means negotiating multiple contracts and deliverables, which is time consuming for small firms that have limited resources. Packaged Success eliminates these barriers by offering a single agreement, a fixed price for each vendor, along with a pre-defined process to ensure a smooth experience throughout the process.

Packaged Success Partner Solutions

The Packaged Success partners can help you focus on your core capabilities, while they seamlessly deliver the other services you need. They are industry leaders in each area of the adoption life cycle: deployment (Olenick), training (Traveling Coaches), and support



(Frontline Managed Services).

Here are some of the challenges you might encounter and the solutions that these iManage partners can

Olenick

CHALLENGE:

Deployment and Testing



Whether you have one office location or nine, your iManage upgrade needs to be deployed to every device. This will require a significant effort on your part in terms of deployment. In addition, testing before go-live will provide your users with a smooth transition to a fully functional software environment, including the new DMS. But, do you have internal resources and expertise to do testing?

Manual deployment to all locations involves time-consuming, duplicative work that will tax your IT team and your budget, especially if you have offices in multiple locations. You will also have to handle the inevitable human errors that often happen when installing via remote sessions, or when manually selecting installation settings for every device in your firm. According to Olenick's historical data, manual installations have a 7% human error rate, resulting in rework, retesting, and frustration both for your IT team and for your end-user.

In addition, even when your deployment has been covered for all machines, can you do testing before go-live? For application implementation projects, Olenick's historical data shows that 1 in 9 features of a deployed system requires an engineering fix (Figure 2). It is important to test to discover feature failures upfront, to avoid interruptions and the increased frustration of your users post-deployment.

SOLUTION:

Packaged Success

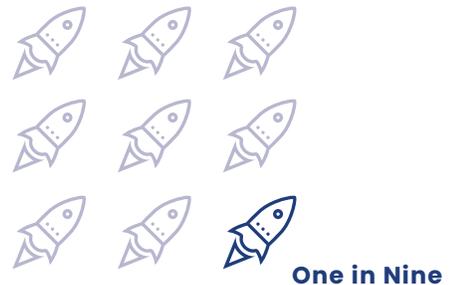
Olenick ensures that your Work 10 deployment is successful across all devices and that you can start all your users on their adoption journey from a common technology platform.

Olenick packages iManage and integrated applications, tests the application integration, deploys the upgrade and verifies the deployment success.

With advanced desktop engineering expertise, Olenick has developed automated tooling to deploy upgrades consistently and efficiently, without remote sessions and travel budgets.

In addition, through testing, Olenick reduces the risk for experiencing deployment and post-deployment issues.

Figure 2: Deployed Systems Requiring an Engineering Fix





CHALLENGE:
Communication and Training

Without effective communication and training, users can feel that the new technology isn't what was promised, and that the old version worked better because no one knows how to use the new one. Users are people, and people go with their feelings. If they are confused or frustrated, they will not use the technology and adoption will fail.

With effective training and user adoption materials, people understand the technology better, which means they are more likely to use it. This is emphasized, for instance, in field research conducted by Traveling Coaches and Frontline Managed Services Managed Services which showed that a law firm incorporating training (e.g. e-learning) significantly decreased the volume of support calls it received post-deployment, compared to another law firm that did not provide any training (Figure 3).

An effective training and communication program increases adoption and teaches people the skills needed to perform their jobs. It provides them with access to apply and enhance their knowledge, to reinforce their learning, and to gain mastery. When people feel they have mastered the technology, then they adopt it in their daily workflows.

SOLUTION:
Packaged Success

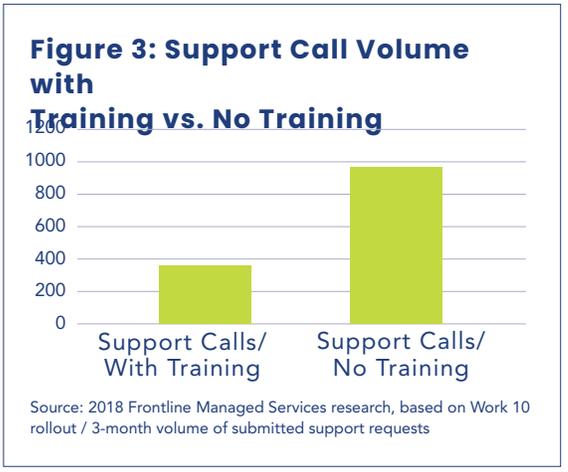
Traveling Coaches focuses on helping users as people because new technology adoption depends on people. Their comprehensive training and communication program increases user adoption exponentially.

Traveling Coaches offers communications tailored to law firms using an award-winning change management methodology, education programs that are tailored to various learning styles, and a worldwide network of veteran trainers.

Traveling Coaches offers e-learning through the LegalMind® Personal Learning Portal and virtual training sessions.

Always focused on helping users learn in a way that works for them, Traveling Coaches has designed various quick reference materials.

Finally, to help with internal promotion and adoption, Traveling Coaches has promotional materials available (e.g. posters) and even a Work 10 commercial that you can use internally to spread awareness.



CHALLENGE:
Constant Need for Support

Most firms prudently staff to “maintenance” levels, not “project” levels. During upgrades, most IT departments require additional support to meet the increase in service requests from their user community, which are due to the new technology rollout.

After all users have received their upgraded system and attended training, there are always many follow-up questions and requests from all levels of legal professionals. These requests and questions can come in at all hours, and IT support has to be ready to handle them.

Even after the most successful rollouts there will likely be a significant increase in the volume of questions that will need to be answered. Historical data gathered by Frontline Managed Services shows that the number of questions will likely increase by 30-50% during the rollout and for 2-3 months after it (Figure 4).

Without backup support the burden of answering these questions will fall on your internal IT team or on other individuals at the firm, and it will disrupt other IT initiatives and projects.

SOLUTION:
Packaged Success

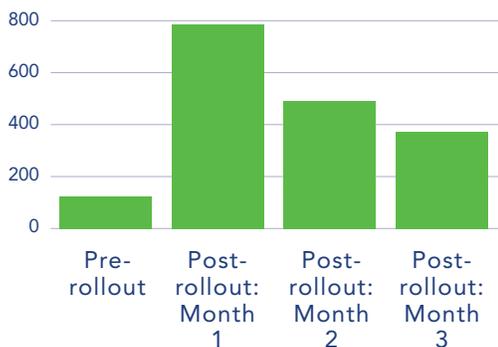
Frontline Managed Services helps out by providing much-needed relief for your internal IT team, and fast, reliable, accurate responses for your users. Frontline Managed Services has partnered with many law firms on numerous iManage Work 10 implementations. This extensive experience enables them to understand end users’ support needs to provide fast and efficient support.

By utilizing Frontline Managed Services’s 24/7 support services, users can get answers to their questions immediately, and they have access to support professionals trained specifically on iManage Work 10 issues.

The efficiency of the response allows end users to focus their time on their work product, rather than allocating it to searching for answers and solutions themselves.

The quality of the support service can improve users’ perception of the new technology and, implicitly, encourage further use and long-term adoption.

Figure 4: Support Call Volume Pre- and Post-Technology Rollout



Source: 2018 Frontline Managed Services research, based on Work 10 rollout / 3-month volume of submitted support requests

deliver through the Packaged Success offering.

Getting Started

With the latest features of iManage Work 10 readily available, you could establish a competitive advantage over Am Law 100 law firms. As a small law firm adopting a cloud solution, you could benefit from fast updates that could be up and running for your users in a matter of days. In contrast, due to their size, Am Law 100 firms have much longer update deployment cycles, which could mean months before they can benefit from their iManage Work 10 updates.

As a small law firm, you are in an advantageous position to realize a full competitive return on your iManage

Work 10 technology investment. Yet, this advantage can only be realized if the software is well adopted. Nevertheless, what if, like many small law firms, you do not have the time, money, or expertise to continually focus on adoption and end-user satisfaction?

In this case, your best plan is to work with the Packaged Success team, who can deliver proven methodologies developed by legal industry experts. Packaged Success provides you with an effective solution to the key challenges associated with the expertise needed for desktop deployment, user adoption and just-in-time training, as well as 24/7 support for your legal professionals — all at a low, fixed price.

Packaged Success Partner Bios



iManage is the leading provider of work product management solutions for law firms, corporate legal departments, and other professional services firms, such as accounting and financial services. We offer a comprehensive, integrated and reliable platform, which is trusted every day by over 3,000 organizations and one million professionals worldwide. We serve a wide range of law firms, 70% of Am Law 100 and over 1,000 law firms with 100 users or less. Regardless of our client size, we design our product updates and new products with our clients' experience in mind in order to solve their challenges in flexible ways that answer the needs of their users.

Learn More:

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With over 20 years of experience delivering legal software projects, Olenick's technologists are experts in the domain. Olenick provides a simple, low-cost way to deploy iManage Work 10 to all devices. We are legal application engineering experts and have customized a solution that includes: application packaging of iManage and integrated applications, an automated deployment framework for any environment, testing of application integration and verification of successful installation on all devices. With 4 global locations, our dedicated legal practice supports an array of clients from Fortune 50 to small and mid-sized firms.

Learn More:

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At Traveling Coaches, we focus on the people side of change and on helping law firms leverage the benefits of their migration to the Work 10 document management system. The lack of user adoption is the number one reason why technology initiatives fail. Coupled with engaging communications and effective learning delivered by experienced coaches, our award-winning change management methodology makes the difference between getting by and getting complete user buy-in. With two decades of experience with hundreds of firms and thousands of iManage customers, we know the road to user adoption better than anyone.

Learn More:

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Frontline Managed Services Managed Services is known for its expertise providing IT Service Desk support to legal professionals. In operation for more than 25 Years, the Service Desk provides unparalleled support to legal teams on both a full-time or supplementary basis. Our analysts are trained extensively in the use of iManage and have direct access to the iManage knowledge base. Due to access to our support centers in the US, Canada and UK, clients have experienced a reduction in overall operating expense of more than 30%, minimized Capex, and improved quality of service. With over 13M resolved tickets, and 24/7/365 availability, Frontline Managed Services Managed Services resolves issues quickly and professionally.

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