

Session III Implementing Your Practice Management System



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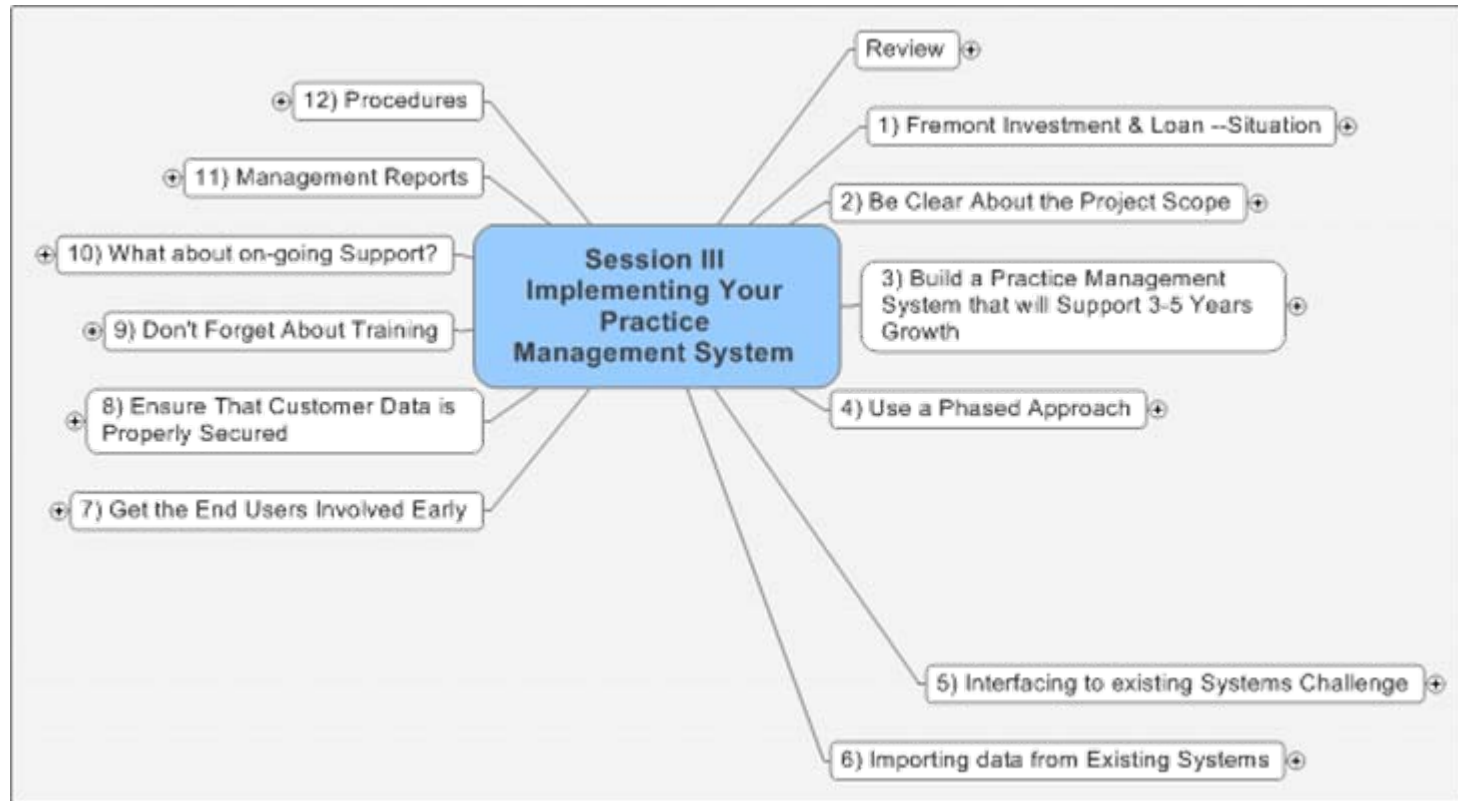
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Session III Implementing Your Practice Management System



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Review

❖ Session I

- Assessing Your Firm's Technology -- Tips and Tools

❖ Session II

- Selecting Your Practice Management System

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Fremont Investment & Loan -- Situation

- ❖ Banking is a Highly Regulated Industry
- ❖ Requirement to Respond to External Customer Complaints
- ❖ Multiple Sources for the Same Complaint
 - Potential for Multiple Responses
 - Potential for Not Responding
- ❖ Needed an Enterprise-wide case management tool
- ❖ Selected LawBase from Synaptec Software, Denver, CO

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Be Clear About the Project Scope

- ❖ What do I mean by scope?
- ❖ Get it in Writing
- ❖ Project failures can be attributed to no or poorly defined project scope

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Build a Practice Management System that will Support 3-5 Years Growth

- ❖ Can the application selected handle your future growth needs?
- ❖ Application servers properly sized
- ❖ Network for remote offices -- big enough pipe
- ❖ Database large enough to accommodate growth

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Use a Phased Approach

- ❖ The WOW Factor
- ❖ 1 WOW = + 2 weeks to the project schedule + cost \$\$\$
- ❖ Get the Basics in Place First
- ❖ Then, Add features based on a prioritized listing
- ❖ Project Scope
 - Is the WOW Critical to Project Success?

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Interfacing to Existing Systems Challenge

- ❖ Project Scope
 - Is the interface critical to the success of the project?
- ❖ On-going support of the interfaces
 - Third Party
 - Internal
- ❖ Who will build the interface?
 - Internal
 - Third Party
- ❖ Cost?
 - Refer to Session II
 - Part of Contract Negotiations

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Importing Data from Existing Practice Management Systems

- ❖ Consider start using new systems while maintaining current practice management system for existing cases
- ❖ Who will map and import the data?
 - Internal
 - Third Party
- ❖ Project Scope
 - Is the data critical to the success of the project?
- ❖ Cost?
 - Refer to Session II
 - Part of Contract Negotiations

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Get the End Users Involved Early

- ❖ Refer to Sessions I and II
 - Integral Part of the Selection and Implementation Team
 - Remember, if the End Users Don't Like the Application, the project fails
- ❖ Configuring the Application
 - Screen Design
 - Data Field Tab Order
- ❖ User Acceptance Testing

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Ensure That Customer Data is Properly Secured

- ❖ The Old Way of Securing Data May Not Work
- ❖ Huge Risk Issue
- ❖ Someone in Your Organization Needs to Review
- ❖ Cost?
 - May Require Additional Hardware/Network Infrastructure

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Don't Forget About Training

- ❖ Initial User Training
- ❖ Application Administration
- ❖ Security Administration
- ❖ On-going
 - New Users
 - New Releases
- ❖ IT Developers Off-site classes
- ❖ Cost?
 - Refer to Session II
 - Part of Initial Contract Negotiations

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What about on-going Support?

❖ Who will do the support?

- Internal

- Will additional staff need to be hired?

- Third Party

❖ Cost?

- Refer to Session II

- Part of Initial Contract Negotiations

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Management Reports

- ❖ What Reports?
- ❖ Who Will Build the Reports?
 - Internal
 - Third Party
- ❖ Cost?
 - Refer to Session II
 - Part of Initial Contract Negotiations
- ❖ Project Scope
 - Are Reports Critical the Project Success?

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Procedures

- ❖ Do You Have Any?
- ❖ Do You Really Understand Your Current Work Flow?
- ❖ Who Will Do the Analysis?
 - Internal
 - Third Party
- ❖ Cost?
 - Refer to Session I
 - Conduct Early in Project
- ❖ **IMPLEMENTING A NEW PRACTICE MANAGEMENT SYSTEM WILL NOT FIX A BAD PROCESS!!!**

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