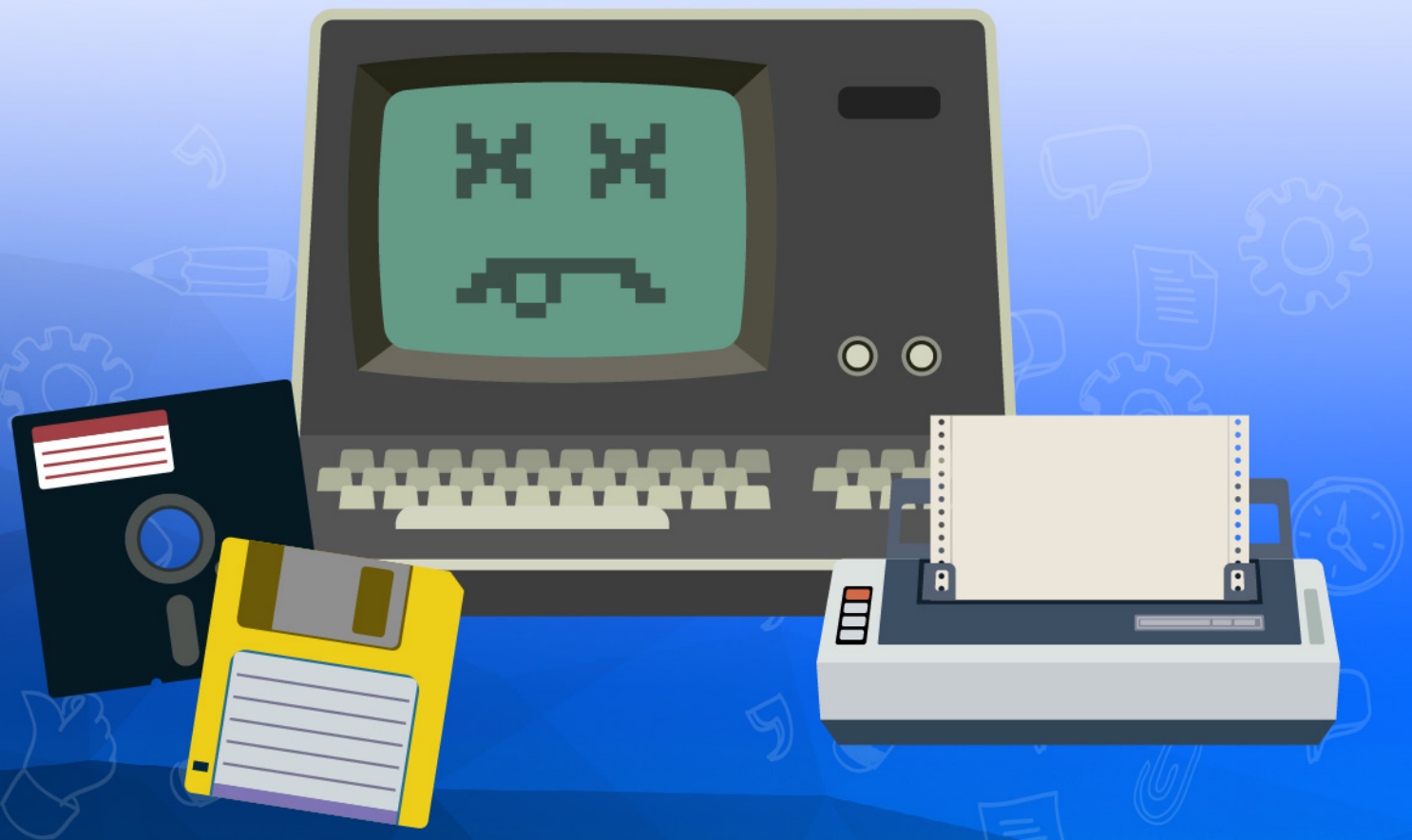


Everything You Wanted to Know About Leaving Your Ancient Legal Software



We get it! It's overwhelming.

Moving ten or more years' worth of law firm data to new software is daunting.

And we're not just talking about ten years of data. We're talking about ten years of habits and ten years of processes built around the screens and reports of your software.

Plus, you have to accomplish all of this without downtime to your firm, and you need to get everyone trained on the new system. But keep reading...switching to a new software is actually a lot easier than you might think!



You are not alone.

Here's the good news: You don't have to do this by yourself.

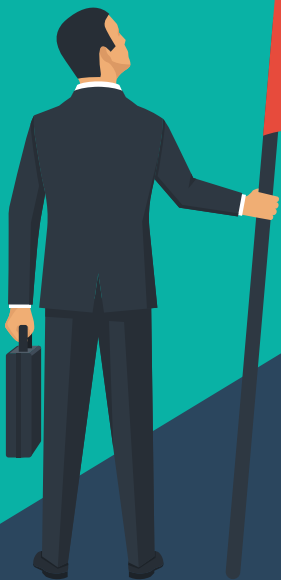
At Rocket Matter, we've successfully transitioned firms from legacy legal software like PCLaw, Amicus Attorney, Time Matters, and many more, and we know what works and what doesn't.

This eBook is packed with all of our best advice. Whether you choose Rocket Matter or not (but why wouldn't you, since it's the best legal software on the planet!), this book will give you a starting point to wrap your head around the issues involved with changing systems.



**“A Journey of a Thousand
Miles Begins with a
Single Step.”**

Lao-Tzu



Shifting Mindsets

The whole key to making it through this process is a shift in mindset.

Think about it this way: If you have organizational pain, you have organizational will. Therefore, you can transition your mindset from “I have a major problem on my hands” to “I have a major opportunity on my hands.”

But a “*carpe diem*” approach will only get you so far. What you’re really going to need to be successful is to challenge your existing assumptions.

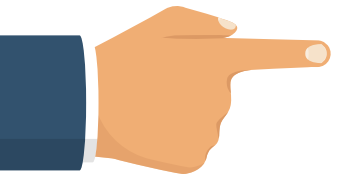


Assumptions to Challenge



Not Ideal: “Our new system must work in the same manner as our old legacy software.”

Better: “We need to solve the same problems.”



Not Ideal: “The new system must work with our existing processes.”

Better: “No system works the same way. Processes must adapt.”

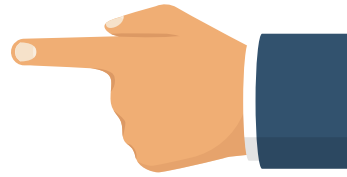


Not Ideal: “We must bring everything over at once.”

Better: “We need to bring over the minimal set of things we need.”

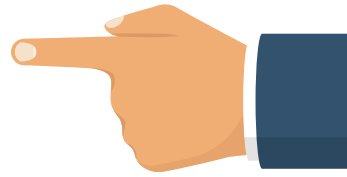
Not Ideal: “I can do this myself.”

Better: “I will let people who have done this before help me!”



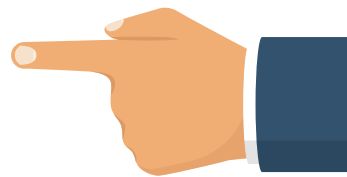
Not Ideal: “Legal tech has not changed much since I started using my old software.”

Better: “It has all changed. I need to get with the times.”



Not Ideal: “I need all of my data in one place.”

Better: “We live in an age where I can use the best tool for each task if it integrates with my practice management software.”



Helpful Questions to Consider

As you begin transitioning to new software, consider these helpful questions:

What functionality do I need on day one of using the new software and what can come later?

For example, do you need to bring over all of your document templates at once? Maybe it's okay to have your most critical ones available on day one, and then you can bring the rest over after the first few months.

What will the transition experience be like?

Who is going to guide you through the process? It's helpful if your new software company has a dedicated point person—as we do at Rocket Matter—otherwise you will be calling into support and talking to a different person every time.

Also, it's helpful to be able to visualize the following: What is the sequence and timeframe of data migration, training, and any additional services that need to take place?

What data will be transferred, and how will it happen?

Ask yourself and your colleagues if you really need to bring over your entire history. Maybe you can keep one or two copies of the legacy system around for reference, but you should transfer the minimal amount of data you need to have a successful transition.

How has legal technology progressed in the years since we purchased our old software?

If your software is more than four years old, and if you haven't seen the new cloud systems, you are in for a welcome surprise. Everything is different. Mobility is now everywhere, and modern systems usually have iPhone, Android, and iPad native apps.

Integrations are no longer "download, import, and pray." Instead, systems talk to each other flawlessly over web API's (application programming interface).

New cloud systems pay a lot of attention to the user interface and ease of use as well as customer support. Subscription revenue models and tough competition mean software companies depend on your happiness. In other words, it's a great new world for legal consumers.



rocket matter

Looking to make
the switch?

CALL OR EMAIL US
TODAY!

1-888-998-4101
sales@rocketmatter.com

Cloud Computing


Another assumption to challenge is the following: Cloud computing is riskier than on-premise computing from a data security perspective.

The truth is that most data breaches involve insiders. Also, on-premise servers must constantly be maintained and protected against attacks.


Is your law firm able to back up and protect your data the same way an enterprise cloud company can? That's something to consider. Take a look at the next page to put this in perspective.



Which Sounds Better to Your Clients?



“My servers are hosted in a secure, 24-7 monitored tier 1 data facility run by Amazon or Microsoft.”



“My servers are next to the break room in my office.”

Questions for Cloud Computing Companies Such as Rocket Matter

Whether you speak with Rocket Matter or another cloud software provider, it's helpful to get answers to the following questions:

Who owns my data?

Answer: You should own your own data. Make sure it's spelled out in your subscriber agreement.

What are your backup policies?

Answer: Hopefully, the company performs geo-redundant backups continuously throughout the day.

What are your security practices?

Answer: Ideally, the company performs continuous nightly scans for vulnerabilities, hosts in a Tier 1 data facility with 24-7 surveillance, and at a minimum, performs periodic penetration testing on their systems.

For more information on cloud security, take a look at the [Legal Cloud Computing Association's standards document here](#). LCCA member organizations adhere to these principles.

How long has your company been in business? Does it have a strong reputation?

Answer: You're looking for confidence. You want to know that the company has a long track record of serving law firms. Rocket Matter, for example, has been operating for ten years, is profitable, and has a highly respected name in the industry. You want an answer like that.

Ethics Opinions from Bar Associations

Many state bar associations have endorsed legal cloud computing with a reasonable care clause. Typically, such endorsements sound a lot like this one from The Florida Bar:

“In summary, lawyers may use cloud computing if they take reasonable precautions to ensure that confidentiality of client information is maintained. The lawyer should research the service provider to be used, should ensure that the service provider maintains adequate security, should ensure that the lawyer has adequate access to the information stored remotely, and should consider backing up the data elsewhere as a precaution.”

For more information, the ABA LTRC maintains a [list of bar associations with cloud computing ethics opinions here](#).



We're Here to Help!

Good luck with your transition. We'd love to be a part of it! If not, we hope this book helped you wrap your head around your project.

If you're moving to the next generation of legal software, you can't find anyone with a better reputation and track record than Rocket Matter. We've worked with thousands of law firms since 2007 and have won four consecutive customer service awards.



Ready to Switch?

Approach your software transition with confidence, with people who know how to get you where you're going.



CALL OR EMAIL US TODAY!

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