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MOVING TO A NEW PRACTICE MANAGEMENT SYSTEM? 7 QUESTIONS TO DE-STRESS DATA MIGRATION

A new practice management system means a lot of moving parts, and making sure every tool being used has been taken into consideration is important for ensuring a successful migration. Asking these questions upfront can help do a data migration the right way.

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Selecting a new legal practice management system conjures up excitement and trepidation at the same time. But how do you know when it's time to make a move? Transitioning from the outdated software applications your firm uses now to a new modern system for the future—the process of data migration—can be stressful. There can be a lot of moving parts and making sure every tool being used has been taken into consideration is important for ensuring a successful migration.

Before you dive in, ask and answer these seven questions:

1. Where Is the Data?

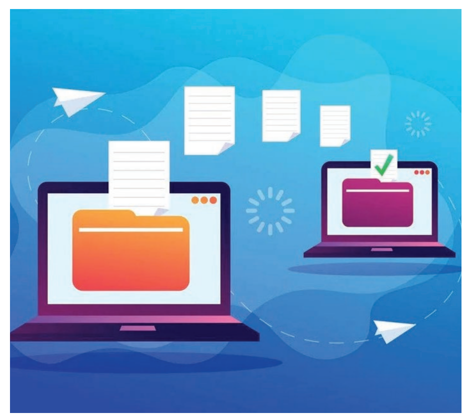
In many cases the move to a new practice management system means a shift to a more complete and integrated system. The data you'll move to the new system may currently be in multiple locations, including the current practice management system, a CRM system, accounting applications or time and billing systems. Each of these should be considered and included in the transition. Make a list of all your data sources.

2. Which Data Will Migrate?

For a successful data migration, work with the new practice management system provider to assess your list of data sources and understand where each type of data—clients, cases, billing data, calendars, etc.—will reside in the new system. You need to make sure that everything you need will be available in the new system.

3. How Much Data Will Migrate?

To scope data for migration, determine how much history you need. This may be influenced by compliance or regulatory guidelines, archiving standards or the nature of particular clients and their cases. Consider contacts



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data, calendars and financial data. Categorize the "must-have" data versus the "nice to have" data. Here are a few recommendations:

- Migrate three years of calendar/event data.
- Import all matters—even those closed—for conflict checks.
- For contacts, the primary client contact information must be imported. All other contacts should be cleaned up prior to migration.
- Any WIP (unbilled time and unbilled expenses) more than

two to five years old that will not be billed should not be migrated.

• Address any longer-term outstanding invoices prior to migration.

4. How Clean Is the Existing Data?

A data migration is your opportunity to get a fresh start on your data. The last thing you want to do is transfer bad data into a new system. To ensure a successful migration, get your house in order before the move. Take the time to plan and conduct a data cleansing effort prior to the migration to fix or remove incorrect, corrupt, incorrectly formatted, duplicate or incomplete data within the source applications. There are tools to help with this, but some human intervention is necessary.

5. What's the Practical Migration Timeline?

When it's time to start the migration, make sure you are working with a team of experts that you can trust to help prepare and move your data from a legacy platform or network drive into your new system. Make sure to take your billing schedule into consideration when choosing the actual dates to do the transition and conduct the migration at a slow period or over a weekend. It's best to close out billing in your prior platform and then migrate to a new one. That gives the billing team time to get acclimated to the new platform before they have to send out the bulk of the billing. The firm should give the billers ample time to get adjusted to the new platform to ensure billing goes smoothly. If planned correctly, the migration to the new system should only take about a week.

6. Will We Have Access to Data That Does Not Migrate?

If there are some things that will not be migrating such as historical data, financials or other reports, make sure you can access them later if needed. You may retain the ability to access data or run reports on old on-premises systems, but licenses may expire on some retired applications. In that case, consider ways to export reports or information into PDFs or another accessible format. A copy of the prior platform should be kept for up to 60 days. Despite all quality control measures, there may be times when you need to access pieces of old data.

7. Does My Vendor Have Adequate Security?

Security is also key. It's important for your vendor to be able to keep your data secure during the transition but also after it has all migrated to the new system. Security audits should be part of the ongoing process to identify potential vulnerabilities.

Conclusion

Make sure you take the time upfront to do a data migration the right way. By asking these seven questions early on, you will have a stronger sense of direction, make better decisions and enjoy a more successful and streamlined data migration to your new practice management system.

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