circle
MANAGEMENT GROUP

Complete Mobility

How Gardner Skelton achieved their vision to be able to work from anywhere on any device.

Client: Gardner Skelton, PLLC

Profile: Nationally recognized Business Law Firm, based in Charlotte, North Carolina

Result: Successful migration of client files to a cloud-based practice and document management systems

"Laura Kennedy of Circle Management Group took a very specific interest in helping us make the progress our business needed." – Robin Griffith, Law Firm Administrator

Overview

Gardner Skelton is a nationally recognized business law firm based in Charlotte, NC with a staff of 17. Over time, the technical and security compliance requirements associated with serving their client base of financial institutions sparked the need to evaluate their management systems.

The firm's technology infrastructure was supporting day to day operations, but it left much to be desired. Together with Circle Management Group (CMG), the team at Gardner Skelton outlined a vision for the technological mobility and business processes they wanted to improve in their next chapter:

1. Being able to work from anywhere on any device including iPhones, tablets and home computers.
2. Unified calendaring across multiple offices, practice groups and teams.
3. Leveraging business and accounting reports for more visibility into key performance indicators such as WIP, AR Reporting, transaction detail, billable versus non-billable time and usage and productivity reports.
4. Streamlining the billing process with easy-to-use templates.
5. Simplifying three-way trust account reconciliation (a requirement in North Carolina).
6. Improving the organization, storage and tagging of documents in the cloud.
7. Training administrative staff on all technology platforms to self-manage and maintain new processes.

Developing a Plan

When engaging with the Circle Management team, the first step was a comprehensive needs assessment. That included the review and investigation of all current systems, how different business units used or did not use the solutions and what each team member's personal frustrations were in their daily work.

By taking the time to understand and document the current environment, CMG's leadership team of Ken Kennedy, Laura Kennedy and Kelly Plunkett was able to make specific software recommendations for both software and training.

Built to Grow – Selecting Solutions for Gardner Skelton's Next Chapter

For Gardner Skelton, there were three key areas of technology to upgrade and re-engineer. First, the time, billing and accounting software Practice Master and TABS3. Second, Worldox their document management system. Third, the firm made the decision to stay with QuickBooks for financial management and accounting.

Recommended Products and customizations:

Centerbase	NetDocuments	QuickBooks
A cloud-based practice management platform with integrated trust accounting and client management features.	The leading cloud-based document management and security platform for law firms.	Develop Centerbase reports that would streamline the process of making journal entries in QuickBooks.

Implementation Timeline and Team

To achieve a successful transition, a team of five was formed to support the migration, customization and training from the project's inception to its end. At the firm, a Project Steward was selected who would be CMG's liaison and primary point of contact with additional leaders and an IT contact for technical configuration support.

The project's total execution timeline was set to commence and complete within 90 days. In order to stay on course, the following measures were specified and were held accountable to both groups:

1. Documentation of all previous and new data elements for matters, clients, documents, email and billable and accounting functions
2. Confirmed phases and milestones with required signoff and approval
3. Consistent and clear communication throughout the project
4. Regular phone and on-site meetings
5. Extensive training and change management coaching firm-wide

Measure Twice, Cut Once –
Development, Testing and Deployment

When transitioning a law firm, one cannot stress enough the value of proper planning and testing. With countless data sets, export types and client files at stake, mitigating risk requires expertise and extensive planning.

Before transitioning any of Gardner Skelton's previous data samples, they were tested to identify any potential import issues. After several rounds of testing and client review, further configuration of both the practice management and the document platforms was made before the full migration began.

Adjusting to Change

Change is a constant and fluid process and it requires an equal amount of attention as the actual software deployment itself. Without an empathetic and guided approach to learning new systems, users are likely to abandon the new tools and revert back to their previous habits or procedures. To ensure the positive reception of new technology by staff, CMG's transition plan included a dedicated training plan that included the following key elements:

• Foundational workshops for Centerbase
• Administrator training for NetDocuments
• Administrator training for Centerbase
• Billing workshops for Centerbase
• End user training for NetDocuments
• End user training for Centerbase
• Administrator training for QuickBooks
• End use training for QuickBooks

Staff members were assigned to one or more sessions with required attendance that was backed by Gardner Skelton's leadership team.

Before and After

Following the training sessions, continued support was available from the CMG team. End users could request additional training sessions, or they could submit a support request for any issues that arose. When discussing the firm's reception to the new environment.

"Everyone loves the mobility of the cloud-based software. Our technology wasn't bad before, it just wasn't mobile. The attorneys always had a hard time working remotely – those issues have disappeared and now they feel like it is very user friendly." – Robin Griffith, Law Firm Administrator

In Summary

The successful selection and transition to new technology requires an intimate understanding of technology in addition to a law firm's vision for how they want to serve their clients. With so many options for practice management, document management and billing and accounting solutions, engaging a partner is a critical factor in an adoption and requires the ability to both implement the technology and provide change management assistance in order to help staff adopt and excel in their new environment.

For more information or to schedule a consultation with the Circle Management team contact us at 336-265-0302 and support@cmgconsultants.com