Law Ruler

The Ultimate Guide to Switching **CRMs**

Does your current client relationship management (CRM) software help your law firm grow, or does it hinder progress with needless friction? All too often, customers report struggling with some obstacles to productivity before switching to Law Ruler.

Do these common challenges impact your firm's daily workflow with your current CRM?

Generic CRMs	Competitors' Legal-Specific CRMS
Custom coding required for functionality	Slow or unhelpful customer service
Generic client profiles and workflows	Missing features or integrations
Limited integrations	Expensive upkeep for server-based software
Lack of security measures required for legal industry	Not designed to scale with a growing firm

If you checked even one of the boxes above, it's time to consider a new CRM.

Many managing partners are hesitant to adopt any new software, let alone one so pivotal to the firm's daily operations. When caseloads are full, switching the CRM is too daunting to contemplate. What if the process disrupts attorneys' work, causes critical data to slip through the cracks, or costs too much time and money without any return on investment?

If you share these worries, you aren't alone. And those concerns aren't unfounded. Not all CRM software platforms—or software partners—are created equal. So when you're thinking about switching your CRM, a bit of due diligence pays off. This guide is here to guide you through the process.

Switching CRMs with Less Stress

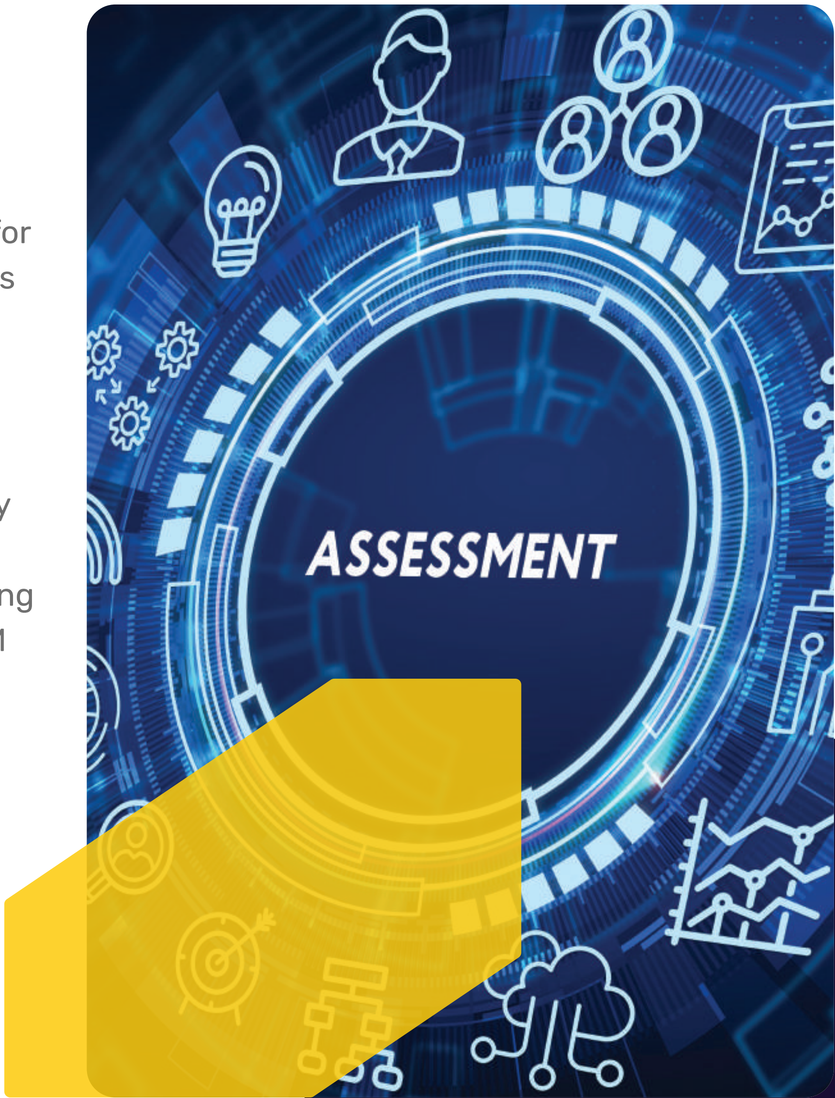
Maybe your current CRM worked perfectly for your firm in years past. But if it's no longer meeting your needs, it's time to reevaluate. With a thoughtful approach, making the switch might be simpler than you think.

At Law Ruler, we recommend tackling the transition to a new CRM in three stages:

1. Assessment
2. Evaluation
3. Implementation

Let's take a look at each one of these stages in detail.

Stage 1: Assessment



To determine which features to look for in a new CRM, talk to key stakeholders to identify your law firm's most pressing needs.

Gather opinions about your current CRM from the people who use it every day, taking care to survey staff from every level of your law firm. A managing partner's opinion of your current CRM may differ drastically from that of a paralegal.

Ask yourself:

- What are your firm's underlying goals for using a CRM?
- What aspects of the current software are most damaging to productivity, client retention, and staff satisfaction?
- What specific improvements might a new CRM support?

Once you understand your team's perspectives, look for a pattern to determine the CRM benefits that are most useful to your firm. To maximize buy-in, consider opening up the conversation to set firm-wide objectives and rank potential CRM features based on their impact on those goals.

For example, you could send staff members a list similar to the one below and ask them to rank each goal in order of importance.

Goal: Simplify the firm's billing process for clients

Feature: The ability to text payment links directly to clients and accept credit card payments online

Goal: Access case and client details faster
Feature: Centralized document management and sharing within the CRM

Goal: Increase client intake by 50%
Feature: Email drip campaigns that nurture leads on autopilot

Begin to narrow down your list of potential new CRMs accordingly.

Stage 2: Evaluation

In addition to your team's needs and overall firm goals, consider the following criteria as you make your shortlist of CRM providers.

Software provider expertise, reputation and service

Features are important, but those features should be backed up by performance. What is each company's reputation? Are they well known for innovation in the legal technology sphere? Read reviews from real clients if possible. Are most clients satisfied with the speed and quality of their customer service?

CRM Features

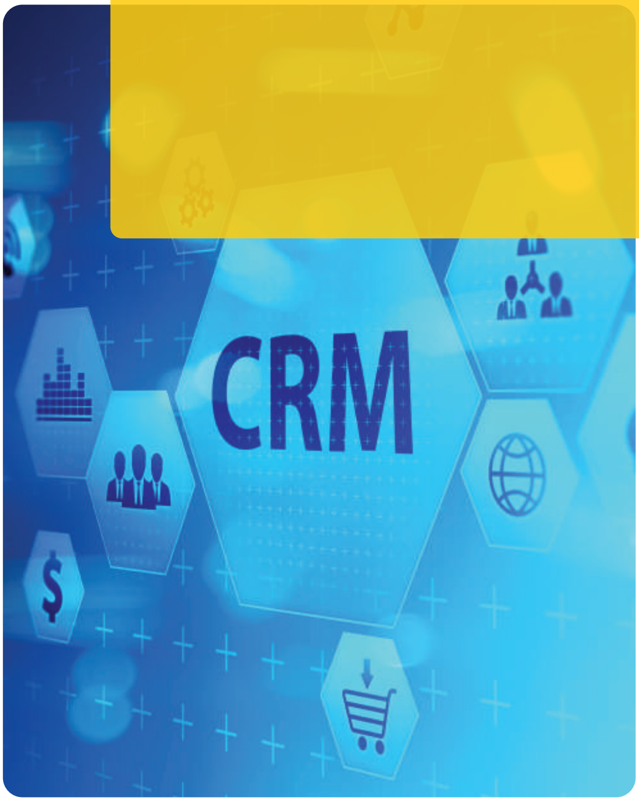
Accessibility

Whether an attorney is working from the courthouse or from home, CRM accessibility is a must. Are the features most important to your team available on a tablet, laptop, or mobile device?

Accounting

In most cases, a legal-specific CRM will save attorneys the menial task of manually transferring client contact and billing information collected during the intake process into the firm's billing and invoicing software.

Does the CRM you're considering integrate with your current accounting software? If not, does it include adequate trust and operations accounting features of its own?



Client Portal

Is a client portal included with the software subscription price? Will clients be able to access their messages, payment info, personal documents, and case details securely online?

Data Migration

As the most dreaded aspect of switching CRMs, this point is a potential deal breaker. Does the software provider offer assistance with data migration? If so, how much will it cost?

If you decide to change CRM providers again, will you be able to obtain historical client data in an easy-to-read format?

Document Sharing

Does the CRM include secure document sharing features that are suitable for legal industry compliance? If so, what steps must colleagues and clients take to access legal documents? Can attorneys send secure access links easily via text and email?

Ease of Use

What's the interface like? Will your team easily adjust to navigating the software or will they need extensive training?

Electronic Payments

Can the CRM be used to send invoices and accept credit card payments online? Will it offer your clients greater convenience?

Integrations

Consider the other legal software solutions your team regularly uses. How many of them can the new CRM **integrate with**?

Security

Legal-specific CRMs usually offer better security than general CRMs, but you still need to do your due diligence about data security. Ask the software provider where your data will be stored. Look for features that allow you to restrict user access for individual matters and clients.

Support

You'll encounter speed bumps from time to time that require live customer support, even with **the best legal CRM**. Will ongoing customer support mean an additional fee?

Total Cost

Most legal software providers offer a tiered pricing system so that you don't have to pay for features you don't use. Is the CRM pricing structure **clear and transparent**? Will the features you need most cost extra?

Training

What kind of training is included with your initial investment? In-person training is ideal at roll-out. Check to see whether FAQ videos and on-demand training sessions are available for free when additional support is needed.

Upgrades

How often will the software provider upgrade the CRM platform? Will upgrades interfere with your team's typical working hours? If not, will they download automatically?

Making a decision

Ultimately, the best legal CRM for your law firm is the one that serves your clients and staff most effectively. Once you've evaluated the features above, share your shortlist of options with your team. Demonstrate how each tool can satisfy the needs they shared with you in Stage 1.

Once you've made a final decision, communicate your expectations about the CRM's purpose and use to ensure the maximum return on your investment.

Stage 3: Implementation

Once you've determined which legal-specific CRM you should switch to, you need a detailed roll-out plan. Start with communication.

Your communication strategy should include:

- A timeline for the process
- A clear, concise overview of what to expect
- What kind of training will be involved
- Who to contact with any questions or issues

As the project moves forward, keep staff informed. If the project timeline changes, share that information. If numerous questions are raised, put together an FAQ to make sure that everyone feels confident in their new CRM.

Delegate

Appoint an internal project manager to coordinate your team with the service provider. This person should also define who is responsible for each task in implementing your new software (and when) to ensure it rolls out on time.

Your project manager should also create milestones for implementing your new CRM based on the "steps" needed to get from purchasing the software to using it effectively. To keep the transition on track, each milestone should have a due date.

While setting the timeline, don't be afraid to make progress towards multiple milestones at once. For example, the timelines for employee training and data migration may overlap.

Don't dread data migration

Switching CRMs is all fun and games until your existing data needs to be moved into the new system. Securely migrating your case information, contacts, billing information and more may feel daunting at first, but reputable service providers work to streamline this process.

At a minimum, your new CRM provider should offer tutorials for reformatting your data and uploading it into the new system. If you don't want to worry about the details, consider a CRM provider willing to handle data migration for you for a fee.

Training for your team

Whether you work in groups or train the entire firm at once, every employee needs to understand your new CRM software for it to be effective. If your law firm is large, it could be helpful to organize training sessions by role.

Live training is ideal, because it offers staff an opportunity to ask an experienced product expert questions in real time, but on-demand training videos and FAQs are also a lifesaver for minor speed bumps along the road.

Switching to Law Ruler is Easy

From data migration to individualized training for your entire team, Law Ruler's industry-leading software support team is here to support you throughout the switch, from start to finish.

See the impact our legal-specific CRM can have for your firm with the #1 client intake, CRM, and marketing automation software used by thousands of law firms.

Schedule a Demo to learn how the Law Ruler team can make switching CRMs less disruptive for your firm's daily operations.