



YOUR TECH TO SUCCESS REPORT

YOUR LAW FIRM

Prepared on: 28th January 2021

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EXECUTIVE SUMMARY

The Tech to Success report seeks to provide recommendations for your firm to undertake to achieve business and strategic goals.

The report includes details on your current systems and processes, and a gap analysis which highlights where there are technological or process barriers to achieving the firm's goals, and our recommendations.

In the recommendations, ServiceScaler will suggest where your firm should invest its resources in working towards achieving those goals.



OBJECTIVES

GOALS

Law firm XXX has defined the following as being their short- and long-term goals.

1. Have all systems in the cloud (Including telephony) by FYE21
2. Achieve a fee earner to support staff ratio of 3:1
3. Open a satellite office in CITY by FYE22

CHALLENGES

There are many challenges to achieving these goals, but the following have been identified.

1. On-premises practice management software
2. Fee earner technology education and engagement is limited
3. Current systems don't support branch office operating efficiently

REQUIREMENTS

Further to the goals and challenges, some other requirements identified include.

1. Out of warranty computers need to be updated
2. Website updates needed
3. Limited CRM capability to support growth



SYSTEMS

SYSTEMS ARCHITECTURE

The system architecture includes the following.

- On-premises hardware server, 3 x virtualized Windows servers.
 - Email Server
 - File Server
 - Application Server (Practice Management Software + Others)
- 10 x desktop computers + 3 x laptops
- 2 x Printer/Copier
- 1 x NBN service (100/40mbps, no failover)
- On-premises PBX phone system, physical IP handsets
- On-premises backup/DR solution – Hard drive rotation

SOFTWARE

The following software packages are being used by the firm.

- On-premises Practice Management System
- On-premises dictation software
- On-premises printer/scanner software
- Precedent management software
- Cloud accounting software
- Office 365 – Apps Only

SERVICES

These systems are currently being supported by the following services:

- MailChimp for Marketing
- Asana for project and task management



PROCESSES

OPERATIONAL

ServiceScaler has identified that the operational processes at XXX look like: (mission critical)

- Clients must call to book fee earner appointments, facilitated by support staff
- Support staff transcribe dictations from desktop computers
- Incoming mail is scanned through the photocopier and attached to current matters

ADMINISTRATIVE

ServiceScaler has identified that the administrative processes at XXX look like: (internal)

- Leave requests are completed on a paper form
- Knowledge articles are written and submitted for approval and publishing by email
- Client invoicing is completed at EOM to allow fee earners to enter billable times



GAP ANALYSIS

TECHNOLOGICAL GAPS

The technological gaps that are keeping XXX from meeting their goals include:

- Core operating software is on-premises
- There is limited internet bandwidth to support cloud computing and software
- Current software utilization is poor, with many features not used

PROCESS GAPS

The process gaps that are keeping XXX from meeting their goals include:

- Reliance on support staff to complete both administrative and operational processes
- Excessive need to copy information between disparate systems in cloud and on-premises
- Lack of one-source of truth, and no transparency over processes
- Requirement for paper-based systems to complete certain processes
- Unnecessary additional steps in processes
- Certain processes are not reaching completion timely, and some not at all



RECOMMENDATIONS

ServiceScaler recommends the following activities and projects be undertaken to enable the firm to move towards achieving their objectives without the constraints identified through the gap analysis. These recommendations have been placed in order of priority or based on dependency.

1. Implement 4G/5G failover on internet connection.
2. Move to Office 365 in its entirety.
 - Mail server to Exchange Online
 - Files to SharePoint
 - Asana to Microsoft Planner
3. Switch to cloud dictation software (SpeechLive or BigHand)
4. Move Application Server to Microsoft Azure
 - Use Windows Virtual Desktops for access
 - Implement cloud-to-cloud backup
 - Decommission on-premises server
5. Implement Teams calling
 - Complete calling through Microsoft Teams with a Call Plan
 - Decommission on-premises phone system and handsets
 - Provide physical Teams handsets for staff that need them
6. Implement digital workflow systems
 - Use Office 365 Forms, Calendars and SharePoint to digitize internal processes
 - Implement Microsoft Bookings for direct bookings between fee earners and their clients or prospects
 - Identify other workflows that can be placed into an approval based or task-based workflow, driven by Power Automate



NEXT STEPS

With the implementation of the above recommendations, your firm will be able to progress with achieving your defined goals of being 100% cloud based, working towards your fee earner to support staff ratio, and open a second office without limitation of access to systems and services in the enterprise.

The next step will be to identify appropriate vendors to facilitate the requirements and identify resources with the capacity and capability to execute the recommendations.

For assistance in execution of the recommendations, ServiceScaler offers ongoing consultancy arrangements that can provide you with the following:

- Business Requirements and Needs Analysis (Incl Stakeholder Engagement)
- Technology Procurement Advisory and Strategy (Where required)
- Feasibility Assessment (Capability and Budget) and Determination
- Technical Scoping and Project Management of Technology Implementations
- Translation of Technical Specification and Documentation to Non-Technical
- Vendor Engagement and Management
- Change Management for Technology Adoption and Utilisation
- Stakeholder Education and Engagement

Please speak to your ServiceScaler account manager for further information.

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