doe LEGAL ™

Exceptional Client-Focused Support

Experienced, committed partners to your success

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Even the best Legal Management Software (LMS) systems can be complex – there are many moving parts, rich customizations and a wealth of options to configure and integrate. While LMS providers take care to make their tools as user-friendly as possible, it's a certainty that you will need technical and customer support.

The Fundamentals of Exceptional Support

Exceptional support is client-focused support. That means support that is designed to meet your needs, correctly and quickly, so that you can spend less time supporting your tools and more time managing your legal department.

In order to make sure you've found an LMS partner who has a support program focused on your success, you need to look deeper into their program's details. Exceptional support is roughly broken down into two categories:

The Mechanics of How Support Requests are Processed

The actual process of how support calls and issues are handled makes up the backbone of a provider's support system. The processes and tools that a software provider puts in place go a long way to determining how focused they are on making their client's lives easier.

How Your Support Team is Assembled

Just as the processes and requirements of your legal department are different than anyone else's, so too are your support needs.

PERSONAL

Are calls answered by a live person, or sent to an automated answering system?

AVAILABLE

Are support personnel domestic or international?

INTERNAL

Are support personnel employed by the LMS provider or contracted out?

REVIEWABLE

Is a complete support history kept to assist with future troubleshooting?

What's more, your support needs will vary depending on which phase of LMS-use you are in: • In the early design/prospecting stages, a more consultative approach is needed. • A developer-focused team makes the implementation phase go more smoothly. • A team that is well versed in your specific configuration and business processes ensures efficient support during the ongoing use phase.

The best LMS providers will provide you with a support team that varies from phase to phase, but maintains a thread of continuity throughout. Understanding how that team should be assembled and what role they serve is the key to knowing how well your LMS provider will support you.

Choose the Best Path for Help and Support

When you need support, do you have an automated system make the call for you? Of course not. So, why should you expect your legal spend/matter management software provider answer your call with one?
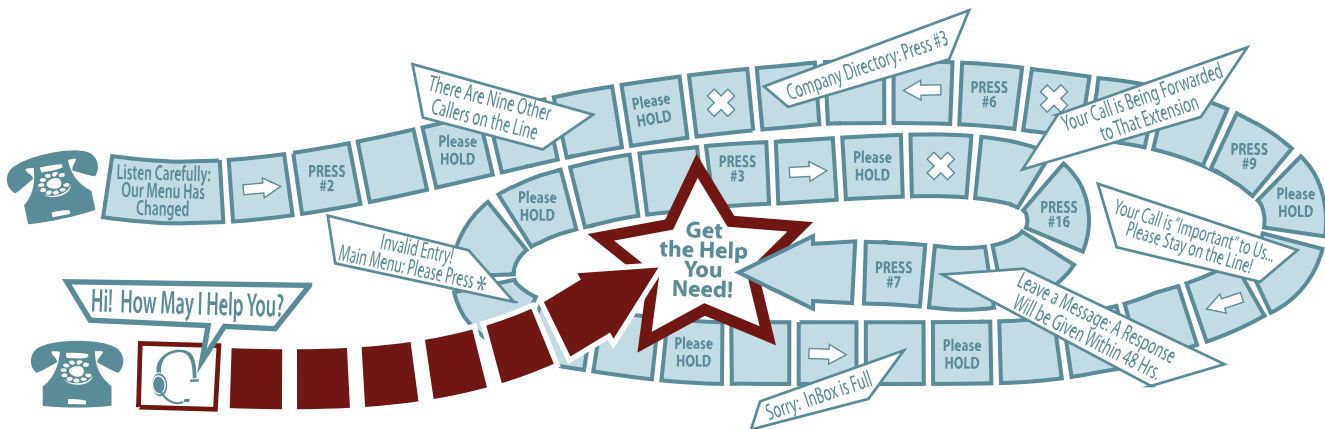
By working with a provider that has a live person answer your call and direct you to the right person to provide the support you need, you'll spend less time finding the help you require and more time receiving it.

Support Phase One: The Purchasing Process

When you are exploring your available LMS options, your goal is to learn about the various features and options available and how they'll help your department. This is also the time when your prospective software partner should be learning all about your legal department and its specific needs. Your sales person should act in a consultative role to exploring your current processes and procedures, thereby tailoring a system to your unique needs. This consultative approach goes a long way to ensuring a smoother transition into a new LMS. Software partners that use this consultative approach will have sales account rep that start

Supporting Outside Counsel

You chose a software solution to add reliability and consistency to your processes. What happens when there is a problem?

INTERNAL SUPPORT

All software providers offer technical support for your staff and the best providers include it at no extra charge.

EXTERNAL SUPPORT

Outside counsel needs support just like your own staff does so everyone works together as a team.

THE COMPLETE SOLUTION

The best software providers will offer the same unlimited support to your outside counsel that they do to your internal staff. This ensures that you get the reliability and efficiency you always envisioned from your software choice.

by asking probing questions about your department and how it runs before diving into a detailed demo of the latest and greatest features of their system. During this initial sales process, your salesperson should be learning about: • Your general requirements • Current internal workflows

- Reporting procedures
- Security issues/concerns

This approach ensures that you have a proposed solution tailored to your specific needs, but it also collects the core information that will be essential during the implementation phase. Your sales person should be able to transition all of the information learned during the consultative sales process right to the implementation team, eliminating the need for you to repeat yourself and allowing the initial rollout phase to begin smoothly and quickly.

Support Phase Two: Design and Implementation

The heaviest lifting by your LMS partner's support team happens during the initial design and implementation phase. Multiple resources are needed for your support team to ensure that the implementation is smooth and that the final design meets your department's needs and existing processes. An LMS partner dedicated to your success will assemble a design/implementation support team that contains:
A Project Manager – Your single point of contact who is the leader of your support team. This person should be in charge of your project from the moment you start until your system goes live.
Dedicated System Developers – The amount of configuration and adaptation needed to match an LMS system to the way your

department already works can be significant, requiring hundreds of developer hours. A software provider that includes dedicated system developers on your implementation support team ensures that your configuration happens quickly and with minimal revisions. A Business Analyst – The role of the business analyst on your implementation team is to understand how your department works and how your LMS can best be configured to support it. Ideally, the business analyst will become your primary support contact (and thereby ensure information continuity) as your system goes live and you shift into ongoing support.

Support Phase Three: Ongoing Use

Once your system has gone live, your support team should transition to best serve the day- to-day needs of your internal and external users. While all LMS providers will offer you a team of support personnel to help with any day-to-day issues, the best support teams will also feature a primary support contact whose responsibility goes beyond supporting the software to supporting your entire legal management process. A primary support person should be very familiar with your specific business processes and how your LMS has been configured to align with them (ideally because they were part of your design and implementation team). This understanding equips your primary support person to proactively watch for opportunities to evolve your LMS configuration to match how you work.

Support Should Be an Open Rolodex

An LMS provider that focuses on providing exceptional support should reinforce this by allowing, even encouraging, you to reach out to the most appropriate contact. That may be a specific developer from your implementation team, your original sales person, or even the president of the company.

Conclusion

Your LMS system is a keystone to how your legal department functions, and so your LMS provider needs to be a partner in your success. Technical support is the place where that partnership is highlighted most often. Every legal department needs technical support from their LMS at some point. Choosing a provider that offers support at no extra cost allows for a more predictable cost of ownership, which creates collaborative opportunities rather than calls to avoid. By choosing a software provider that commits itself to providing exceptional client- focused support, you'll ensure that your time is spent doing what you do best: managing your legal matters.