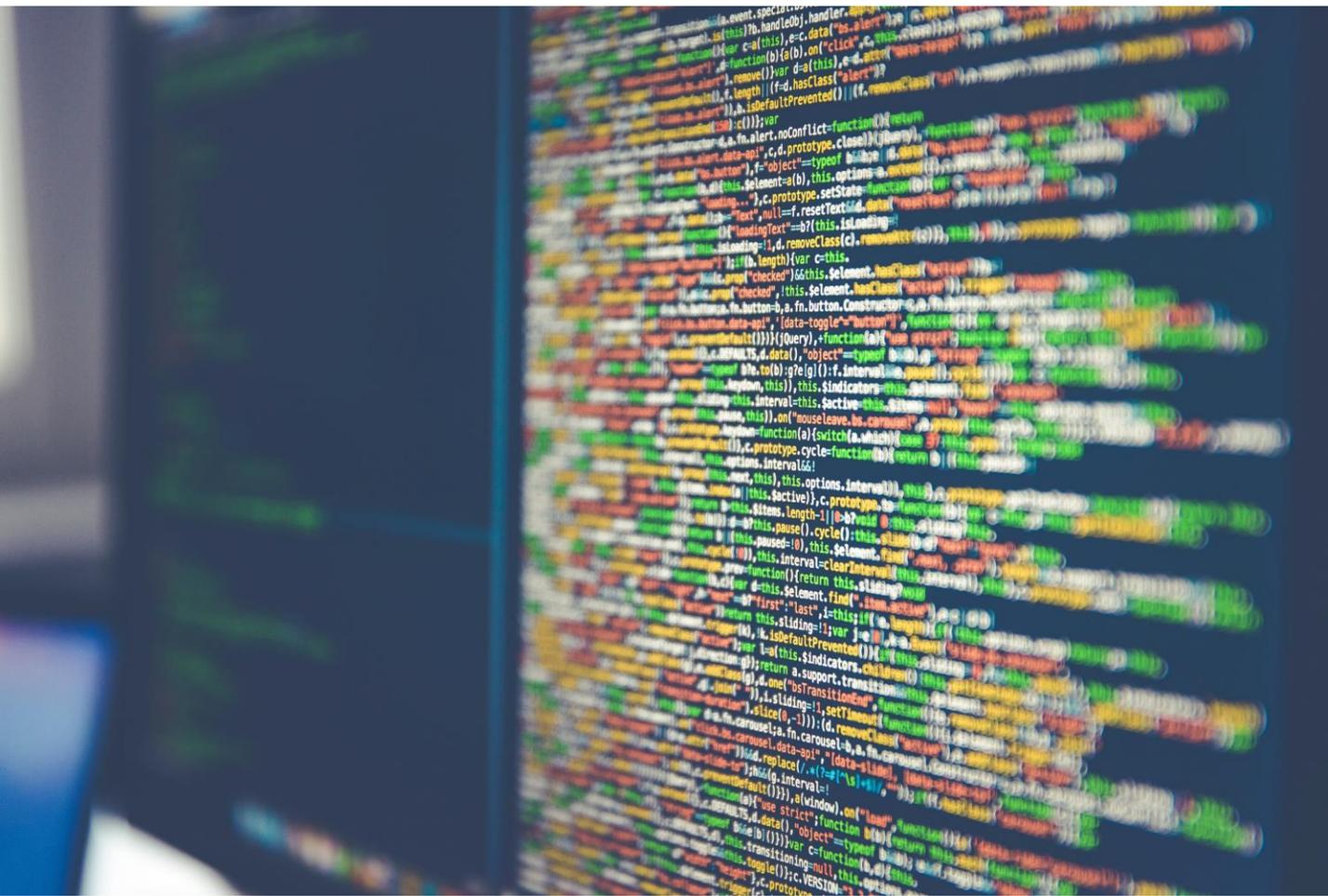


# White Paper

## Key considerations for the implementation of new technology

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The implementation of any technology can be daunting. However, as we have seen with COVID-19 especially, it is a great enabler and promotes efficiency, profitability and even job satisfaction to those staff appropriately trained and using it well. It should disrupt the workplace as that is what technology is designed to do and therefore will require change management and leadership to see its appropriate and most effective implementation.

In this paper, we look at the possible downfalls, the best way to implement and 10 considerations to look at when you are evaluating your potential new technology partners.

## To consider prior to implementation

The most important element to consider when acquiring new software is to have a clear objective – what is the problem you are trying to solve or how will the technology make your life easier – why are you doing it?

Technology can assist in many ways – for example:

- Automation of repetitive tasks like document generation
- Reduction in re-keying data
- Ensuring consistency of production
- Speeding up the process to free up time for more added-value activities
- Communication across teams
- A single view of client interactions
- Management of risk
- Process improvement and management
- Using the right resource for the right task
- Attracting a new client base
- Changing the way you interact with clients
- Fighting off new entrants to a marketplace/disrupting a marketplace

In summary, have a clear idea of why you need and want this technology – it will help in communication to staff and managing the change.

## Potential downfalls

It is unrealistic to believe that any new technology comes with no change or any disadvantage, so make sure that the solution does innovate, and any advantages outweigh the disadvantages some may feel.

Some implementations fail – but why?

- Lack of leadership – failure to communicate, or giving in at an early stage
- No explanation of why or how it will be implemented
- Insufficient training of staff so they can't reap the benefits promised
- Poor change management – especially those most resistant to change
- Lack of investment – implementing an inferior product due to cost
- Rushed or poor onboarding with no follow up afterwards



### 5 top tips for a good implementation of new technology

1. Be open and honest from the beginning about why you are researching or implementing something new
2. Work with your provider to better your processes
3. Work with your provider to effectively onboard and train your staff
4. Involve key staff who will promote this for you internally – those positive early adopters
5. Be patient but persistent – change isn't easy for everyone but persevere, sometimes people just need time to get used to something new and new technology needs time to bed in

### Stay with the plan

Change is not easy for everyone.

Especially when we all say how this new technology is going to change our world, all the benefits that the organisation will reap from its implementation, yet the individual just sees their daily life disrupted and no benefit for them – just hassle or anxiety.

Remember that while you might be happy that you are managing your firm's risks, you now have confidence in the consistency of what is being produced, you have the reports that show you how many documents or cases have been finalised, some individuals might still be struggling and they might not see or experience the benefits until they are completely familiar with the software or tool.

To positively manage the change, ensure effective onboarding with your technology partner. Don't just do some initial training, but do follow up training. Ensure this is communicated in advance and not seen as someone failing if they need refresher training after a couple of months. Ask for volunteers to be internal mentors so someone struggling can go to a peer for assistance. Talk about the benefits to the individual as well as to the company.

So have confidence and stay with the plan - it won't be easy and you do need to accept that not everyone will be onboard from day one.

## Key considerations when choosing a technology partner

You know why you want to implement this technology, but now you have to find the right partner. Here are 10 key considerations for when looking at a solution. Do your due diligence but also if you have done this correctly, then you can make a decision confidently and more swiftly. Also, be aware that if something looks too good to be true for its money – it probably is! Technology is normally priced at the value it will deliver so always remain true to your overall objectives.

Key area	Why?
1. Security	Security of your clients' sensitive data is uppermost in the era we live in – with cybercrime being so prevalent – so it is important when choosing a provider that you look at how seriously they take security. Do they have regular penetration testing of their solution to ensure they are using the latest thinking in cyber protection? Cloud-based solutions are the most secure way of protecting data – it is much harder for a hacker to infiltrate a huge supplier of cloud solutions than it is to access your data through less secure access to your office-based equipment and software. And yet 93.3% of enterprises keep their mission-critical workloads in on-premises infrastructure (IDC). Ask your potential providers who they use for cloud services. There are many out there that cost just a few pounds a month but don't offer the same level of security. Don't be shy at asking how much they spend on servers or who they use. Ask if data is encrypted during transfer, what protocols they have for back-ups of data? Where is your data stored? In the UK or further afield? Do they have any accreditations or external recognition?
2. Data protection	In addition to the point above, how is the provider registered with the Information Data Commissioner? Is it registered for Data Protection? Who is the processor, who is the owner of the data? Has it had any GDPR breaches?
3. Longevity	In technology there are always companies popping up but then closing very quickly. Ask how long they have been around. Can you check their credit history? Check on Companies House how long they have been incorporated. What do their accounts say? Are they financially secure and growing? How many staff do they have? Are they reliant on a small development team?
4. Value	Investing in technology can be very expensive. Software as a Service (SaaS) is a modern way of providers effectively renting you the software instead of charging you hundreds and thousands of pounds to develop a bespoke solution. You pay a small regular cost and the security, updating of the solution and hosting etc lies with the technology provider. Look for solutions that you can implement quickly but ask about onboarding – how will your users familiarise themselves with the technology? Have a clear idea of what you want to achieve from investing in technology and think about the return on investment you would like to see from the solution – list the problems you need to solve and how well the provider matches your requirements. Which business process is it going to help you remove 'non-added' value steps from? How can you eliminate or reduce the time spent re-keying? How will you measure the ROI once it is implemented? How will you invest the saved time? Have a clear plan of the value you want and how you can achieve it.

## Implementation of new technology into your practice

Key area	Why?
5. <b>Support</b>	Introducing a new system will always see teething problems, there will be those in your organisation that don't embrace change and progress, who prefer to stay doing everything in the same way they have for years. They may be afraid of trying something new and need to be able to get support when they need it. Ask what support is available. Do you have to pay for support? Is there ongoing support you can benefit from? Can you speak to someone or do you need to wait 24, 48 hours to get an email reply? It is important that help is available to effectively introduce the new solution but for continual professional development of the individual also.
6. <b>Experience</b>	The company may have been operating for a while but what level of experience do those developing the system have in the technology and that system? Can you be satisfied that if there are any issues within the solution, that it will be able to be fixed? Also are they experts in the field that they are providing? Or are they technology providers branching into an unknown space where they have seen an opportunity? Look for best in class solutions that you can link together. The one-size-fits-all is rarely an expert in everything, so you need to evaluate the expertise in each element of the product they are providing.
7. <b>Recovery</b>	Any IT service is prone to external attacks, as with point 1, companies must do everything they can to protect against attacks, but what happens if they or you are unfortunate enough to be hit by an attack? What provision do they have in place to assist you getting back up to speed as quickly as possible? Even the simple issue of a laptop failure which holds client data in a desktop-based solution – how will you get that back? Ask about disaster recovery – what their protections are and how they can assist you with a failure of this kind.
8. <b>Partnership</b>	Any relationship with an IT provider must be a partnership. Are they a good listener or are they just trying to put their solution into your organisation? Have they understood your issues, your goals, your business processes? Technology never sits still – how have they developed their service? What's new? What are their future plans? How can you feed into their development, so you get what you need? You need an organisation that will listen to you and work with you for your goals.
9. <b>Recommendations</b>	Who does your provider currently work with? Are they happy to provide you with reference sites or testimonials from current customers?
10. <b>Communication</b>	Don't be afraid of asking how they communicate with you. When are changes made to the system and how will you find out? Any downtime you may experience? Who can you talk to other than support if you need to? How will you be invoiced and how do you get a copy of the invoice?

## Implementation success

You have now chosen the right partner, you are happy, you have agreed pricing. Everyone is ready to start implementation, but how do you do this? What are the key elements that make up a successful implementation of a new technology? Below are 8 key steps to consider before starting implementation.

Step	
1. <b>Onboarding plan</b>	Agree with your technology partner how you will implement it with your staff/firm. The best onboarding plan is a combination of your partner's experience of their product and what has worked well with other similar firms and your knowledge of your business, your staff and how well they will take to change. Have this plan agreed, costed and timelined.
2. <b>Appoint super users</b>	The best way of achieving success is to have some early adopters who those struggling can go to. Staff are also much more likely to listen to those doing a similar job to them extolling the virtues of the new software or tool than someone in management telling them it will make their life better!
3. <b>Adapt your business processes</b>	Process map your new way of working, involve the super users in the task to help with adoption by all and have that on hand for communication. It is also really good practice to have these processes in place to ensure bad habits don't creep in.
4. <b>Create a change management plan</b>	Identify everyone who is likely to be affected by the change. Then communicate to this group and explain how they must behave for the project to succeed. Establish the compelling business and individual reasons and give frequent project updates.
5. <b>Ongoing effective communication</b>	Communication is key – between you and your staff and the project team but also with your technology partner. A good technology partner will be with you during the implementation and assist at every stage. Always be the first to communicate process change decisions and solicit feedback.
6. <b>Control the feedback</b>	Above we talked about soliciting feedback – an important thing to do but take control of it internally. It is very easy for an individual to raise all the problems with the partner directly and they get inundated with negativity. Identify a key person to collate all the feedback and liaise with the partner. The partner should want to hear the feedback to help them improve their service but this way you can filter out the key issues to address.
7. <b>Regular and final reviews</b>	Review the implementation during regular interviews with your partner. Put in place review meetings and ensure these are in place until such a time that you deem the onboarding to be complete. Ensure you learn lessons from any implementation to go forward to future ones.
8. <b>Second stage training</b>	In initial training, there will only be a fraction of it that is remembered after a few months. It is good practice to do more advanced training or re-training for those slower to adopt the change, on an ongoing basis.

## Summary

Technology has disrupted many industries and the legal industry is seeing new entrants using technology to do just that. Although it is important to consider all the elements in this document, it is also important to act and not be afraid. Change is upon us – a legacy of the COVID-19 era but also with the changing requirements and buying habits of future generations.

The right technology, the right partner and the right onboarding plan can transform your business, protect and prepare it for future challenges and help you achieve greater efficiency and profitability.

## Contact us

If you would like to talk to [Arken.legal](https://www.arken.legal) about how we can assist you with process improvement and digitisation, please email [info@arken.legal](mailto:info@arken.legal) or call 01732 867792.

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Here is what some of our clients say:

“Arken is an absolutely fantastic tool. It is extremely easy to use and has helped our practices in Will drafting to a huge extent. I could not be without it now. I would recommend to any legal specialist looking to invest in Will writing software. Very cost effective too. “

Sophie Yates, Fodens Solicitors

“We did a careful review of available solutions and chose Arken, as it has a very user-friendly and intuitive user experience, helped us with an improvement in our working practices, introduced time efficiencies and facilitated our ability to standardise our processes and mitigate our risks. The support team at Arken are excellent – very responsive and invested time to understand our needs. We had extensive support before and after going live. Arken is very easy to use, the templates are consistent and we have reliable support.”

Gemma Garen, Director of Quality and Compliance, Ellisons Solicitors