



Sarah Fahey
Consultant, Change Management
and Transformation Practice

The Freeths' story: Going live in lockdown

Helping law firms get maximum value from their technology investments. A long-standing Pinnacle mantra that's informed all our consulting work. And one that goes beyond systems expertise, software development and data quality management to embrace quality training too. We help drive the highest levels of adoption, utilisation and experience, both at the implementation phase and throughout in-life support.

In this article, we interview Pinnacle trainer Sarah Fahey. She tells us about a recent project which shows our ability to adapt and work in new ways so we continue to deliver an essential service.

Tell us about the client

Freeths is a full-service law firm with 13 offices in England. Its practice management and business intelligence software was a combination of end-of-life systems and in-house developed applications, and the end-of-life scenario obviously necessitated a change. The firm chose Aderant as its replacement PMS and BigHand Quantum for its business intelligence requirements.

The initial requirement for a training manager actually came about in March 2019. Following a recommendation from Aderant, Freeth's Rhod Shipley contacted us. It can be tempting to pigeonhole Pinnacle as a TRE house but we have all the skills to support Aderant-led change projects too. I was appointed to the project until the expected go-live in November 2019.

How did the project kick-off?

As is so often the case with projects like this, the scope and the go-live date changed. That's when you call on all your years of experience as you have to be resilient and resourceful, agile and adaptive. For all the frustrations and delays, you still need to keep your eye on the ball and deliver.

One of the advantages of contracting with Pinnacle is that you're dealing with a consultant who absolutely understands the need to flex and be accommodating. So for example, the go-live date slipped initially due to data and software issues. For me that just meant a simple reschedule of the tasks I was responsible for. However, key for our client was Pinnacle being happy to have me 'drop off' the project for a time until Freeths were ready for me to come back on board.

Were there other challenges down the line?

There were a couple of curve balls. The first was Freeths' decision at the start of 2020 to implement BigHand Quantum. It was brought into the scope of the training quite late on and made it even more demanding as the solution was being customised right up to the eleventh hour. It meant we had to create content for the online sessions in double quick time.

The second was, obviously, COVID. By March we had already mapped out most of the change and training activity needed but lockdown on March 23rd was like a guillotine dropping on it all. However, once we'd assimilated the consequences, we knew we still had all the IP and learning in our gift – we'd just have to impart it differently and support people with alternative approaches.

It helped that the whole world went remote almost overnight – it was a universal shift and law firms generally were really quick to adapt.

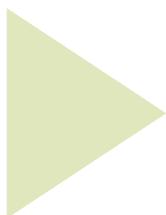
How did the project move ahead after lockdown?

We had to re-think our approach very quickly so we could deliver the requisite levels of training and support for the go-live completely remotely. No classroom training, no deskside coaching, no floorwalking, none of that was open to us and Teams was basically our new best friend!

Our first move was to reschedule the go-live date to accommodate the changes. And then we rolled with the following:

The planned UAT activity was redesigned for online delivery:

- Testers were invited to attend 2 x Teams training sessions, led by me, with a subject matter expert to answer questions.
- After each session we sent every tester a set of tests and a suitable matter to use and asked when they intended to start testing.
- Each tester completed a results document and sent it to me. I reported the results to the project team.
- I was available via Teams to support the testers.
- A number of tests involved Aderant workflows, so members of the finance team were tasked with checking each workflow task and rejecting it or completing it as appropriate.

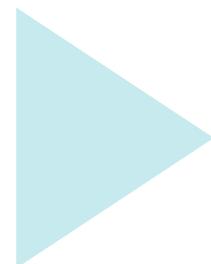


We replaced the conventional model of in-person go-live support with an extensive network of highly trained 'super-users' who would be available to colleagues via Teams.

- Super-users attended multiple in-depth training and detailed Q&A sessions.
- They completed mandatory structured practice exercises. Project team members and I were available in Teams to provide support during these sessions.
- We created supporting videos and documentation and made them available to super-users via the firm's intranet.
- I tracked users' completion of the mandatory exercises.
- I held regular Q&A sessions for the super users and, when necessary, organised follow-up training, delivered either by myself or a subject matter expert from the project team.
- The names of super-users were distributed to the firm at go-live, and they provided 1st line support for their colleagues.
- Any issues that super-users could not deal with were passed to the project team.
- Members of the project team were scheduled to support go-live in Teams, on the telephone and by monitoring an Outlook 'Aderant Help' Inbox.

Classroom sessions for lawyers and support staff were no longer a possibility so we scheduled online Teams training sessions, which were well attended and received!

- A session was recorded and made available on the firm's intranet.
- Because of the drawbacks of online training, we supplemented the sessions online with Q&As.
- We provided lawyers and support staff with an array of instructional videos to supplement an extensive set of user guides which had been tested by the super-users.



What was the verdict from Freeths?

They were very positive throughout and very happy with the way we adapted to circumstances that no-one really had a playbook for.

We had a couple of great quotes which modesty doesn't prevent me from sharing!

Rhod Shipley

Senior Project Manager, Freeths

I'd just like to confirm that it's been great working with you – during what has been a tough and challenging year for everyone (on the project and because of Covid). I'm fairly sure that we wouldn't have got through it or got to where we are today without your input. You've been an essential cog in our machine. So, thank you for all of your help, guidance, support and delivery of training.

What do you see as the key takeaways from the project?

There are three main points I'd focus on.

One, training. Regardless of how it is delivered, training is as vital as every other part of a go-live project. Often it is rushed and skimmed on, but you are never going to extract optimal returns from systems unless people know how to use them properly!

Two, Pinnacle is always willing to adapt and change to help clients in any way it can, remit permitting. We weren't the implementation partner in this project but we were still a pivotal part of its success, and that wasn't just down to me and the team, but the flexible attitudes of the consulting business.

Three, remote/virtual learning has come of age and will take its place in our blended toolkit going forward. It proved itself effective and cost-efficient and gives clients more options now, particularly when deploying across multiple sites. With innovations such as the Client Resource Centre, Pinnacle is well set to continue to deliver results offline and on.

