# The Rocket Guide™ to Data Migration for Legal Practice Management Software

Kareem had a major problem on his hands: his legacy PC Law installation was unable to keep up with his 40-user firm. He needed a new legal practice management system, STAT.

So Kareem, who is a real person by the way, signed a contract with a market-leading practice management software, who promised to move their legacy PC Law data over their new practice management software. Problem solved.

Not quite.

What happened next created a crisis for the law firm. The data migration was botched, and the new system, after months of pain and tens of thousands of dollars spent, was unusable. The new software company completely mismanaged the data migration, leaving the firm's billing in shambles.
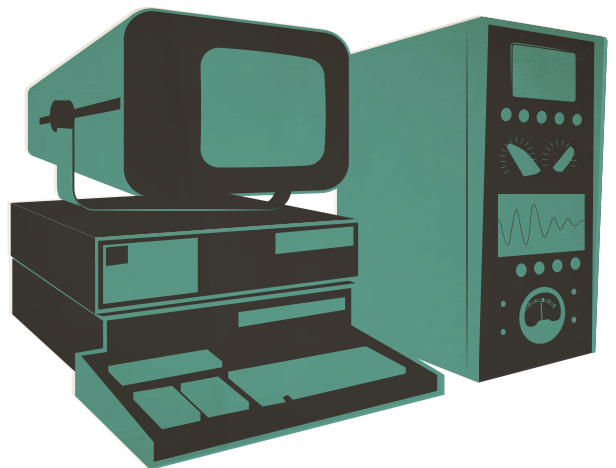
From our vantage point at Rocket Matter, working with thousands of law firms over the years, we have unfortunately seen this scenario play out way too often. And Kareem's wasn't the first firm that we had to rescue out of this nightmare.

The truth of the matter is that moving data from one legal practice management system to another is a difficult, potentially error-prone process that needs to be handled with extreme care and patience. Legal software vendors, in a rush to close

deals, often mislead law firms, telling them that the data transfer is easy: A non-event. Furthermore, our experience is that some vendors are much worse than others, as we've had to rescue more of their clients.

However, if you're armed with some basic knowledge and have your expectations set, you'll be able to approach a migration realistically and with confidence that it will succeed.

This white paper, in a question-and-answer format, aims to educate any law firm contemplating a data transfer on the pitfalls and best practices you'll find along the way.

Exactly how hard is it to pull off a successful data migration?

Here's the good news: successful data migrations are achievable. However, they are typically not easy. Or fun.

Let's start off with a goal: When you move data from one system to another, you should end up with a set of information that's cleaner than what you had in your old system. That's what we aim to achieve here at Rocket Matter, and it's a good goal to pursue regardless of what practice management system you choose.

For small firms with little history and considerable tech-savviness, you might be able to take a do-it-yourself approach, but that's the exception to the rule. For most firms with any significant operating history, you need to approach the migration with respect. You need strategy, professional help, and time and resources to make it happen.

When we assist firms with botched data migrations (what we refer to as a rescue operation), they typically tell us that their legal software vendor told them that the migration would be simple. So here's a good rule to follow: the more a vendor insists that your transition will be easy, the more likely they are to screw it up.

As Jeff White, our Chief Revenue Offer, stated on a recent episode of the *10 Minute Law Firm Podcast*, "If anybody sells you on an easy transition, they're selling you on something that's just not a fact. This is like changing the oil on a running car."

We have 10+ years of data! Can (or should) we move all of our data over?

When you're switching to a new practice management system, imagine that you're moving into a new office. It's a great time to get rid of stuff you don't need and make sure everything's nice and clean in your new setup.

Data works the same way. Over the years, you've built up duplicate records. You have a field in your Time Matters database for a middle initial, and someone put a semicolon there. First names and last names are reversed for certain clients by the temp employee you had working for you in '09. And you have cases so old, it no longer makes sense to refer to them at all.

The cleaner your data is, the easier your transition will be (and the less it will cost). As the old saying goes, "garbage in, garbage out." So it's a good idea, if possible, to get your old system in shape before the move. It will certainly reduce costs.

Typically, we advise migrating only active clients and matters with existing balances. Information related to those matters can be brought over as well, including documents, tasks, notes, and calendar events. We also suggest bringing over all contact records in order to perform background checks. Keep the older stuff in one copy of your legacy system for archival purposes.

What you should be very careful with is bringing over individual billable items and invoicing history. The reason for this is that migrating accounting information from one system to the next, unless they are straightforward balances, results in extremely complicated situations and much head-scratching. To avoid the time delays, endless time in excel spreadsheets reconciling two different systems, we recommend either engaging a highly qualified data consultant to extract and import this information, or simply leaving this data be and referring back to your original system when needed.

How do you get data out of the old system and into the new one?

Getting data out of the system can be done in one of two ways: the error-prone way, or the accurate way.

PC Law, Time Matters, Amicus Attorney, Tabs, and other legacy legal practice management software have internal databases that store and manage the information in the system. The right way to access this data is to work with professionals who understand how these databases are structured and have a holistic view of how legal data should be handled.

By doing so, you will end up with the cleanest, most accurate representation of your data, ready to import into your new system. When you work with data

professionals, your contacts will maintain their associations with their matters, billable information will be accurate and end up in the right place, and data relationships will be honored.

The wrong way to get data out of a system is to manually export files. This is a very error-prone way of transferring information, as the exports will then need to be reimported into your new software without any guarantee that your data will be related properly.

To get data into a system, your best bet is to work with a professional that understands the data model of your new software. This could be the vendor itself or a third-party consultant who specializes in legal practice management systems.

Most cloud-based options have DIY import screens for firms that are transferring a small volume of information. Unless the law firm truly understands their data and where it will be located in the new software, these should be avoided.

My previous data migration failed and we have a mess on our hands. Can anything be done?

As we mentioned above in our story with Kareem, we have rescued firms from really ugly data migrations, from newer cloud vendors and legacy applications alike.

In these instances, data engineers can do forensic database work on the original system and the new botched system. After an analysis, your professional can map out a plan for you to get back on track and get clean data.

These operations can be a bit involved and expensive, but the results resolve the crisis the firm has. As Kareem says, "Rocket Matter really helped us out throughout the entire data migration process. They not only helped us move from our previous platforms to theirs, but also cleaned-up and consolidated our databases to one great system. We are now able to bill better than ever before."

We heavily customized our existing software. How does data migration work in that scenario?

You are not alone. It's very common for law firms to have highly customized versions of Time Matters, Tabs, or other programs (even Outlook), that have been jury-rigged for the needs of the firm. In fact, there's an entire industry of consultants that makes their bread and butter with these kinds of projects.

The simple answer is a good database professional will be able to get your custom information out of your legacy software. It can be transferred to the new system, but how you view or find that same data may be different.

To illustrate, Rocket Matter's Business Intelligence module allows you to customize reports, which allow you to replicate data views that you're used to. There are also custom storage fields associated with matters and contacts, which can store custom data from your legacy system. There are also general purpose notes which can receive your custom information that doesn't have a home anywhere else. Most modern cloud systems do something similar.

It is important to understand that no new system will exactly replicate the workflows and visual screens in your old software. You're going to have to learn new tricks, but ultimately you're going to be solving the same problems. This tends to be more of a human resource than a technology issue, as many employees are

resistant to change. If this is an issue or potential one for you, you might want to download our white paper *How Managing Partners Get Bad Advice*.

That said, if you are afraid of losing functionality, you can always ask us to quote custom engineering work from our professional service team. Sometimes it's worth investing in the exact solution you want.

Can I import some data now, and other data later?

Aside from rushing the project, partial imports are probably the single biggest mistake you can make when migrating data. Partial imports cause a lot of problems because you can end up with data you don't trust.

Consider the following scenario: in import #1, the client record for John Smith comes over into your new software. The law firm starts using the new software and adds billable time, tasks, and documents related to John Smith.

Import #2 comes in and a duplicate record for John Smith is added to the database, with what turns out to be more relevant information than the John Smith from the first import. You now have a polluted database that needs to be cleaned.

When you perform imports, you bring in thousands of records at once, and John Smith might be only one record among hundreds that are affected. Now you have a big mess on your hands, and you're actively using the new software with major data inconsistencies.

The best practice is to import all your data first, examine it, and when you are comfortable, start using the new software on a coordinated firm-wide "go live" date.

How do I know if I'm working with someone competent?

If you're working with Rocket Matter, we only work with people we trust with a deep knowledge of our system, databases in general, and major legacy players. Even if you have an unusual system, our experts can usually obtain the information from the database.

If you're not working with us, your best bet is to rely on references. Get two or more quotes if possible, and keep in mind that this person does not have to be local. As long as they have an internet connection, they can perform the migration. So choose the best person possible for the job, regardless of location.

If you're working with another vendor, make sure that they provide realistic expectations about the effort, time, and expense involved in your migration. If they (or anyone else) gives you a quote without looking at your system, that is a very bad sign, as migrations can vary wildly in complexity.

Keep in mind our maxim from above: the more a vendor insists that your transition will be easy, the more likely they are to screw it up.

How much will it cost?

When it comes to data migrations, you get what you pay for. High-quality professionals who can produce a clean set of data in a new system are valuable.

Several factors will affect your price, including the complexity of your situation, the volume of data (especially documents) you are transferring, and the cleanliness of your data. Prices can range from $1,500 for simple jobs up into the $20-30,000 range for complicated rescue operations.

If up-front costs are prohibitively expensive, your vendor may allow you to "finance" the migration by paying for it over a period of time.

Conclusion

Migrations are tough but doable. And when you're using a new, modern system, with a brand-new clean set of data, it will be well worth it. A few do's and don'ts as reference:

✔️ **Do:** Approach the migration strategically with skilled partners.

✔️ **Do:** Remember this maxim: the more a vendor insists that your transition will be easy, the more likely they are to screw it up.

❌ **Don't:** Cheap out on your migration. You will get what you pay for.

✔️ **Do:** Clean your data before migration for bad data, duplicates, and information in incorrect data fields.

❌ **Don't:** Start using your new software with the migration until you've validated that all of your data is there and in good shape.

❌ **Don't:** Import the data in separate batches, unless you are not going to use the software between those imports.

✔️ **Do:** Request a preview mode for your new system as part of the migration process.

✔️ **Do:** Import all your data first, examine it, and when you are comfortable, start using the new software on a coordinated firm-wide "go live" date.

About Rocket Matter

Rocket Matter helps law firms offer better client service and also increase revenues by more than 20%. The company was the first cloud-based legal practice management software on the market, landing its first client in 2007. It has been a leader ever since.

Rocket Matter helps law firms transition from their legacy software to the most powerful, easy-to-use time and billing software in the industry. Also, when law firms want to make more money, go paperless, or increase confidence in their trust accounting, Rocket Matter helps them achieve those goals. With award-winning customer service based in the United States, it's no wonder thousands of law firms swear by Rocket Matter.

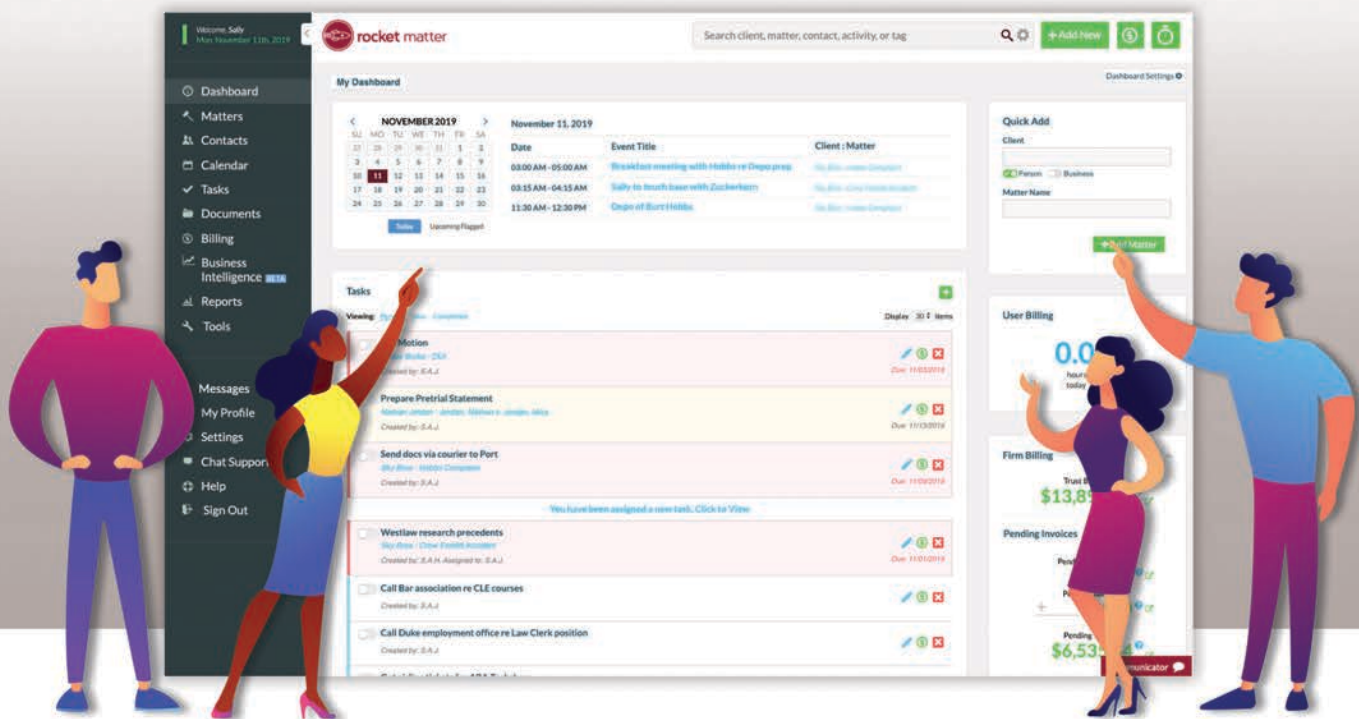Please enjoy this book and become part of our cutting-edge community on Facebook, LinkedIn, and Twitter. Also, check out our Legal Productivity blog.