Burr & Forman LLP Teams Up With PayneGroup For Their Windows 7/iManage/Office 2010 Migration

FAST FACTS

Company:

Burr & Forman LLP, a century old law firm with 300 attorneys in 9 offices throughout the Southeast

Industry:

Legal

Geography:

Headquartered in Birmingham, Alabama with offices in Florida, Georgia, Mississippi and Tennessee

Requirements:

Upgrade the firm's technology to Windows 7, iManage and Office 2010, including PayneGroup's software solution

Environment:

- Microsoft Windows 7 (64-bit)
- Microsoft Office 2010 (32 bit)
- iManage DeskSite 9.04
- PayneGroup products

PayneGroup Professional Services and Product Solutions:

- Migration Roundtable
- Project Management
- Custom Training Materials
- Training/Floor Support
- Forms Assistant
- Numbering Assistant
- Metadata Assistant

Results:

Successful migration to Windows 7, iManage, Office 2010, and integrated solutions

COMPANY

Burr & Forman LLP is a century old full-service law firm with a forward-thinking approach to providing legal solutions. With nearly 300 attorneys and offices in Alabama, Florida, Georgia, Mississippi and Tennessee, Burr & Forman offers a wide range of business and litigation services to diverse clients with local, national and international interests.

CHALLENGE

Our primary goal was to standardize the desktop environment, getting everybody on the "same page." We had three different document management systems in place and multiple versions of Microsoft Office running on both Windows XP and Windows 7 platforms. Our new desktop standard would have iManage and Office 2010 in a Windows 7 environment, which included Payne's Forms, Numbering and Metadata Assistants.

Several of our offices had already upgraded to Windows 7 and Office 2010, but still needed to migrate to iManage. Our Birmingham office needed to migrate to iManage and upgrade from earlier versions of Windows and Office. All offices would receive training and reimaged computers with solid-state drives installed. Our goal was to begin implementation in October and finish by Thanksgiving—giving us only 49 days!

PREPARING FOR THE MOVE

When choosing a training and professional services provider, our top three criteria were: (1) quality of trainers, (2) flexibility in meeting our fast-paced schedule, and (3) total package offered by a company already familiar with our environment and with expertise in ALL programs integrated into our new desktop.

Based on these factors, we knew that in order to have a successful implementation, PayneGroup had to be our training partner. Working with PayneGroup would bring "the best of breed" in meeting our needs based on their reputation and our established relationship with them. Once that partnership was in place, we were able to focus on the other items on our project list—we knew PayneGroup had our back.

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– Ron Poole, Burr & Forman LLP

STRATEGY AND IMPLEMENTATION

With such a short time frame to complete the project, we knew that communication was key to accomplishing our goal. We focused on providing information to our user community in order to set their expectations and continued to keep them informed. This project also required coordination and flexibility with all team members involved, including numerous meetings with our "super users." As a result, we were successful in accomplishing our goal.

For each office, prior to cutover weekend, specific groups of users attended training classes designed specifically for their practice area and technology needs. Various types of hands-on classes were offered and conducted based on business workflow. Training also included takeaway quick reference guides. The computers were then upgraded and deployed on cutover weekend. The following Monday, users were back to business with desk-side/floor support assistance, e-mail support, as well as our standard telephone support channels already available to them.

PayneGroup was an integral part of our team— from project planning, development and testing, to training and support.

USING THE PAYNEGROUP SOFTWARE

Our personnel depend on the Forms and Numbering Assistants to complete the majority of their daily word processing needs. These PayneGroup programs are an integral part of our base systems. They offer streamlined functionality that our personnel would otherwise have to manually perform, saving them time and ensuring document quality and standardization. Integrating the PayneGroup software with Office 2010 and iManage was imperative for a successful migration.

RESULTS

The response of Burr & Forman personnel to the new desktop environment, and in particular, the training and floor support we received from PayneGroup was overwhelmingly positive. Although the training was very fast-paced, it was geared toward what they needed to know to do their job. PayneGroup provided the total package—high quality trainers who were experts in our environment and the programs being used and integrated into our new desktop environment.

The quality and expertise level of PayneGroup's trainers and their adaptation of their training materials to our environment were invaluable in meeting our training requirements. We also appreciated the consistency of training standards being used by all trainers in all offices. This allowed our "rollout support" team, as well as our outsourced helpdesk personnel, to know exactly what information was disseminated throughout the firm.

In my opinion, the rollout was a great success and could not have been accomplished in the allotted time without PayneGroup's participation on our team. I highly recommend their services and products to any firm needing an outside source with which to partner.

ABOUT THE AUTHOR

Ron Poole is Chief Information Officer at Burr & Forman LLP. Ron's technology career spans over thirty years in the manufacturing, insurance, construction markets, with the last twenty years focused on the legal community. His background includes application development, network operations, project management, disaster recovery and business continuity. He holds a strong belief and accountability in the support of the end-user community and staying abreast of technology trends that would benefit the firm.

Prior to joining Burr & Forman, Ron was CIO and Principal of Covenant technology whose focus was on the legal and medical markets and holding the position of Director of IT for a law firm in the Birmingham area.

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