9 TIPS
FOR A SUCCESSFUL COUNSELLINK
ONBOARDING PROJECT

Before the CounselLink Onboarding Project begins, below are a few tips to help position for a successful project. The following tips have been shown to promote engagement and adoption, resulting in a successful onboarding experience and significantly increased satisfaction with the application.

1. **First and foremost, develop a Project Charter/Vision.** There is a proven connection between a successful onboarding and a project team that buys in to the project. If leadership presents a compelling vision for the project & its short/long-term benefits, the project team will be more engaged. A high level of engagement across departments has been shown to contribute to LONG TERM success. It is highly recommended that senior leadership be present at the initial Requirements Elicitation Meeting(s) to personally communicate the vision and rally the team to get excited and engaged for the changes to come.

2. **Develop success criteria and metrics.** Successful customers are able to articulate how they will measure success once CounselLink is implemented. They develop metrics to track toward success criteria and celebrate small wins along the way. It is important establish a baseline for these metrics before starting so that there is a way to gauge progress. Potential goals might include: reduced time required to process invoices, reduction in bill amounts, faster bill review, discounts received, etc. The team may also have project-specific goals such as 100% team participation.

3. **Generate a positive buzz.** Change is difficult and not always welcome, but getting people excited about the vision and the new software's role in achieving goals and improvements, can motivate the team and facilitate a smoother conversion.

4. **Be realistic.** On the other side of change management, it's good to be realistic and understand that some changes may not equate to improvement for every

individual. There may be unwelcome shifts in responsibilities or processes for a few in order to realize improvements for the legal department as a whole.

5. **Organizational readiness.** Make sure the project team is ready and has the time allotted to put in the work. The core project team will have weekly status meetings with the CounselLink team, and the internal team will likely need weekly working sessions as the requirements gathering and decision making process begins.

6. **Identify and engage all stakeholders.** Engage all groups that will be affected by the onboarding project and the resulting changes in process and technology. Examples are representatives from each legal department/team, IT, accounts payable, etc. While the core project team may have a high level knowledge of the tasks performed by everyone, some teams may have developed other processes to accomplish their tasks that the core team isn't aware of. By engaging all stakeholders and users in the process, the team can make sure that all functional needs are being addressed and that any impediments or roadblocks are identified and addressed early on.

7. **Process improvement.** The onboarding of new technology is an opportunity to review and revamp old processes. Rather than continue forward with old processes, the CounselLink Consultant can help take a critical look at what activities work well and are needed and where redundancies may be eliminated.

8. **Pre-work and Initial Requirements Elicitation Meeting.** Completion of the assigned pre-work before the Requirements Elicitation Meeting begins is key. The Requirements Elicitation Meeting will occur either via WebEx or onsite. Having the CounselLink Consultant onsite at the beginning is a great start to a project but an onsite can also be scheduled after some or all of the requirements are gathered. The CounselLink Consultant will take a collaborative approach in determining the best timing of an onsite meeting based on specific needs and Project Charter/Vision.

9. **Early Familiarity with CounselLink.** Teams that have a working knowledge of CounselLink are able to make more informed decisions quickly. To that end, LexisNexis and the CounselLink Team encourage everyone to view the videos on the next page.

LexisNexis University
CounselLink training videos

CounselLink offers **free** on demand training courses on all aspects of the application, for both customers and law firms.

- To get an overview of the system, go to **www.lexisnexis.com/university.**
- Start by creating a new account and if asked for an account number, type in ten zeros "0000000000".
- Then click on 'Current Schedule', choose 'CounselLink Corporate', 'Getting Started with CounselLink' and 'Launch'. Choose one of the first two videos to start:
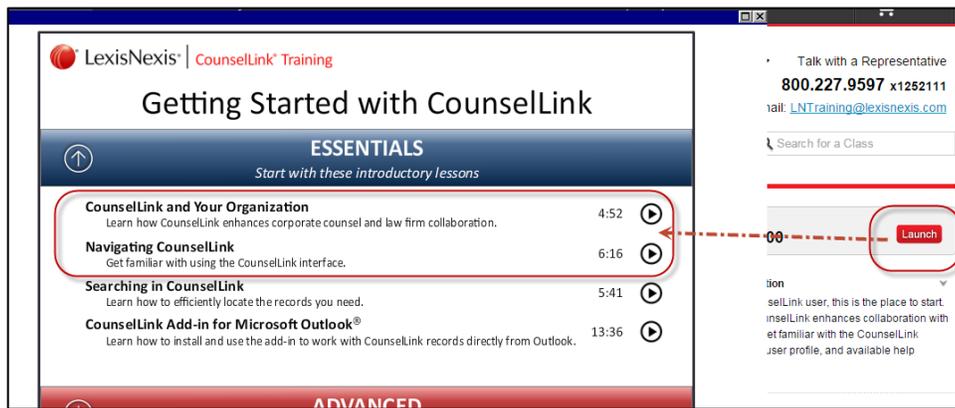
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