



Merging law firms' technology: forewarned is forearmed

Syncing computer systems should not be a last minute operation, says **Damian Blackburn**



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The last couple of years have seen a number of firms merging and the trend appears to be on the increase with more planned or rumoured, depending on what you read or believe. There are lots of factors that drive a merger of law firms, but technology is not normally one of them. As a consequence, firms often leave the issue of meshing two discreet computer systems until the very last minute. This not only leads to technical and administrative difficulties, but often to additional expenditure above and beyond the perceived cost of merging.

In the world of legal IT, there are a finite number of systems in use, and in merger situations, firms sometimes find that core systems are the same. This can lead to complacency when considering the implications of blending the two entities together. In reality, even with the same core systems, firms will have configured them differently, applied different procedures and policies and

generally use them in subtly different ways.

Early preparation

One of the first considerations when merging systems is what to do with the two sets of data that currently exist. While it is plausible to run the two sets discreetly after a merger, it brings a multitude of potential problems into play, and best practice is to combine them into one repository. Where this happens between similar systems, decisions need to be made about how far back data should go, how to handle duplicate information (especially CRM information) and if the data accurately maps across. If this is to be done between two different systems, additional data mapping exercises need to take place. This kind of exercise can take a while, so early preparation, and conversations with systems vendors should be factored in.

Where there are differences in systems, decisions on which of these is to prevail need to be made carefully. Often the larger party in a merger imposes their technology on the other, but this does not guarantee results. An objective view of which technology is better suited to the new environment should be considered. These sorts of exercises take time and money, but not nearly so much as having to unravel mistakes later.

Firms' liability

However, it's not all about data. Careful examination of contracts for services and outsourced provisions need to

be undertaken to ascertain exactly what the firm's liability is, and what the provisions for termination or transfer are. Of course, at the point of merger this may be a little late, but on the basis of forewarned is forearmed, the earlier this is done the better.

Most firms will also be in the midst of software support agreements, which will invariably require termination if the systems are merged, and there is always the possibility of being in the middle of an IT project, which brings both expense, headache and the feeling of having wasted money.

Along with the normal ingestion of staff routines, any outsourced IT support could potentially mean Transfer of Undertaking (TUPE) transfers, and the additional complexity they add to these situations. Tales of badly handled TUPE transfers are rife. Mergers are generally a frenetic time for senior people in law firms, and a potentially unpleasant one for others, so consider a people plan, to include contracts and contractors alongside incumbent staff.

Project management

Other issues will crop up, such as how to handle document libraries, knowledge repositories, and archived information. These are not difficult to deal with if the project is managed correctly, and the investment of time in forming and executing decisions on them will ensure more seamless integration.



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Understanding both firms' document and document lifecycle policies and knowledge taxonomies will go a long way to providing a framework to work to.

The last word on the technical side of mergers is a non-technical one. Keep your senior technical people informed and up to date on these kinds of situations, give plenty of notice, and provide an appropriate budget to handle any changes. Mergers can be difficult, but ignoring the technology side is only likely to make matters worse. **SJ**

CONFIGURING YOUR MERGER

- Involve Strategic IT staff early
- Budget in changes
- Consider staffing issues
- Examine all your IT contracts
- Take stock of licence agreements
- Agree on data transfer
- Examine document and archive repositories