PROLAW USER GROUP
CASE STUDY
Office of the County Counsel, County of Santa Clara, CA
Warner Angle Hallam Jackson & Formanek PLC

BUILDING UP THE PROLAW COMMUNITY WITH USER GROUPS
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User groups are an effective way to connect with ProLaw® representatives and industry peers to hear about current news and product information and to help stay current on how local firms are handling their business challenges. User group meetings are typically facilitated by a local client user group leader and the regional customer experience advocate. Agendas are crafted to cover the latest information on product releases, ProLaw announcements, industry news and, most importantly, experiences from other local ProLaw users on relevant topics.

A NETWORK OF SUPPORT FOR GOVERNMENT LEGAL OFFICES

As Senior Management Analyst at the Office of the County Counsel, County of Santa Clara, Valencia Saffold knows a lot about ProLaw from Thomson Reuters Elite. ProLaw has been in use for about half of the 27 years she’s been with the department, and as her office’s sole ProLaw administrator, Saffold realized she could extend the investment much further by regularly connecting with others versed in the system. So, while attending industry networking events, she began to connect with other ProLaw admins and eventually formed an official user group.

As versed as Saffold is in ProLaw, she previously found it difficult to optimize in performing functions unique to government legal office objectives. This led to her forming the user group; she created a platform from which ProLaw users from government legal offices could turn to each other to determine industry best practices and overcome obstacles.

Today, Saffold’s user group serves as a support system for 15 government legal offices across California. Led by Saffold, user group meetings are held virtually once a month. A typical meeting opens with members discussing ProLaw features and issues and sharing their latest enhancement requests. Next, attendees are invited to workflow demonstrations, and sometimes third-party vendors showcase how their applications and services can boost efficiency. Members then discuss plans to meet at the next Elite event, such as the annual VANTAGE User Conference, and the meetings close with a round table discussion of miscellaneous topics as time permits.

Without her user group, Saffold believes that many government legal office users would have a limited understanding of how to resolve very specified issues. “That’s not to say that the ProLaw Support team isn’t an important resource, because it certainly is, but the unique nature of our business has us asking questions they’ve sometimes never heard before,” Saffold explains. “By coming together, we can overcome those obstacles that we might not have been able to figure out on our own.”

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Valencia Saffold
Office of the County Counsel, County of Santa Clara

THE OFFICE OF THE COUNTY COUNSEL, COUNTY OF SANTA CLARA, CALIFORNIA

The Office of the County Counsel is the legal counsel for the Board of Supervisors, the County Executive, every county department and agency, and numerous county boards and commissions. The office provides legal assistance to county departments in addressing a wide range of diverse issues in every area of internal and external service delivery.

WARNER ANGLE HALLAM JACKSON & FORMANEK PLC

Since 1959, the attorneys at Warner Angle have delivered the highest quality legal services for individuals and entities throughout Arizona and surrounding states. Each of its lawyers possess a unique set of strengths to provide knowledgeable, innovative solutions tailored to address clients’ individual goals and needs.
To help better understand the user group’s goals and objectives, each meeting is attended by at least one member of ProLaw Support. A ProLaw sales manager is always present, and other members of the Support team join on occasion to address specific questions that came up at prior meetings. Additionally, one full-day meeting is held each year and attended in-person to offer members demonstrations, in-person networking, and direct contact with ProLaw support.

“Having direct involvement from ProLaw is certainly helpful in getting answers to our questions on the spot, and we like voicing our recommendations for upcoming releases too,” comments Saffold.

"I consider our user group to be an extension of my ongoing education with ProLaw; it is a reliable tool that helps me better succeed at doing my job."

Sandra Haislet
Warner Angle

SPREADING KNOWLEDGE ACROSS WARNER ANGLE

Another outspoken proponent of ProLaw user groups is Sandra Haislet, firm administrator at Warner Angle Hallam Jackson & Formanek PLC. Like Saffold, Haislet was eager to form the user group to get the most out of her system after attending similar meetings for a previous software program in the region. In fact, she began organizing user group meetings for the Phoenix area as soon as ProLaw was deployed at her firm.

Haislet’s user group meets once every quarter for an in-person lunch session. All types of ProLaw advocates are welcome to join—from those managing front and back office functions, to IT, and even prospective ProLaw clients. Haislet also extends the invitation to vendors who service ProLaw—not only to provide demonstrations of third party add-on tools, but also to speak to the successes achieved and challenges faced by other firms not in attendance.

While Haislet says that the user group meetings are wonderful, she stresses that they can only be successful if they function in a manner that best serves the group. As opposed to finding new ways to enhance the solution, attendees openly share their ProLaw experiences to help each other receive optimal benefits. This can be achieved by troubleshooting issues, suggesting best practices, identifying unexpected uses, and uncovering workarounds to solve problems.

“Our meetings are strongly focused on ProLaw as it stands today and how to use existing capabilities to our best advantage,” says Haislet. “We have a very strong sense of community, and the more members our user group has, the more we will all get out of our use of ProLaw.”

For Haislet, user group meetings ignite a chain reaction of learning, as she shares what she learns across her firm and quickly incorporates new knowledge into her training sessions. Since she is the go-to ProLaw expert at her firm, it is important that she can turn directly to fellow ProLaw users to ask questions to expand her knowledge of the solution and make her firm’s daily processes easier.

“I consider our user group to be an extension of my ongoing education with ProLaw; it is a reliable tool that helps me better succeed at doing my job,” Haislet describes. “Any time I can resolve an issue or speed up a process for the workforce, that translates into better service for our clients.”

COMMUNITY-SHARED KNOWLEDGE

According to Haislet, “The social aspect of ProLaw user group meetings, and the connections we have made through them, have become imperative to our ongoing success.” She says that her user group community has become her go-to resource for advice on product functions and potential integrations. For example, there is one user group member users can turn to when they have questions regarding rule sets, and there are several others who frequently recommend third-party integration tools.

Haislet recalls another instance when her firm was struggling with its credit card company, and another user group member shared how his firm was able to resolve similar struggles by integrating the credit card processing tool ClientPay®. Because she heard first-hand how the application helped another firm overcome the same struggles, Haislet decided to make an investment that she feels she wouldn’t have considered otherwise. Following this piece of advice, Haislet says, resulted in a significantly expedited payment process, directly benefiting both the firm and its clients.

Another significant resource for Haislet has been the IT personnel within her user group. When it comes to making tweaks to billing statements, she can quickly turn to those experienced with Microsoft® SQL® to walk her through the process. “Not having to outsource these tasks has produced a huge cost savings for our firm,” Haislet notes.

Similarly, for Saffold, maintaining a list of the versions each user group member is using has made it easy to identify who to contact to ask questions and share knowledge. “Our members are so much more apt to help each other out because they have met and formed relationships with one another—that is a benefit of our user group that keeps on giving,” she notes.
For example, when a recent Microsoft update conflicted with one member’s version of ProLaw, a notification was sent to alert users with the same version who might also have been affected. Upon receiving the notification Saffold, whose department had made the update the day prior, quickly investigated to see if her ProLaw platform would also be affected. Although it turned out that the issue did not impact her firm, she was still grateful to have been warned about something that potentially would have gone unnoticed and unresolved.

In another instance, Saffold recalls learning about a search field issue during a ProLaw Roadmap session that wouldn’t affect most ProLaw users, but it would have a big impact on functions specific to a government legal office. By relaying this information across the user group, members who had already planned their upgrades were able to adjust their timelines to make sure the glitch would be resolved before going live.

Another loyal member from Saffold’s user group maintains a share site that all users can access to upload and review documents, presentations, vendor information, and other items shared during meetings. “As the user group leader, the share site has been a big relief, making it easy for me to direct members to a variety of reference materials,” she comments.

**INTENTIONALLY LATENT ADOPTERS**

Neither Saffold nor Haislet would identify herself as an early adopter, and thanks to user groups, neither have to worry about taking the first plunge. Both attest that a major benefit of their user groups is that someone else always makes the first move to a new version or upgrade, and they can sit comfortably, waiting to hear initial feedback before pulling the trigger themselves.

Saffold prefers to be a more latent adopter because she has found that many of the benefits of upgrading aren’t always obvious. She can turn to those in her user group to find out what new tools they get, how they use them, and if there were any speed bumps in the process.

“Our office never wants to be first on a new version, so we are grateful to have a member in our user group that likes to be the guinea pig,” comments Saffold. “Asking similar offices questions about a newer version can help us understand the problems it can solve for us before we are ready to fully commit.”

“**If you have the opportunity to participate in a user group, I strongly urge you to join in whatever capacity you can.**”

Sandra Haislet

Additionally, Saffold notes that providing her office with a more accurately painted picture of a future version of ProLaw helps get better buy-in. “Many offices moved to version 2016.2 before we did, and knowing what was going to change for us really helped smooth out the transition,” she says.

For just about every ProLaw user, the next big decision comes to the cloud, and Haislet is taking the same modest approach regarding her firm’s eventual transition. “My user group has helped me gather insights on implementing ProLaw in the Cloud that would take me a lot longer to find out otherwise, and like previous updates, we are waiting to get a green light from those taking the first leap;” Haislet says.

In fact, for anyone planning a transition to a newer version of ProLaw, or even implementing for the first time, Saffold and Haislet strongly recommend tapping into their nearest support network. “To firms that feel they aren’t getting all that they want to achieve with ProLaw, I would say that joining user groups is the easiest way to take it upon themselves to find a solution,” states Haislet.

And to those on the fence about joining a user group, Saffold says, “It’s completely worthwhile and a whole lot of bang for the value.”

“**Sharing insights of your own and sending new knowledge back to your team makes you feel like a rock star. If you have the opportunity to participate in a user group, I strongly urge you to join in whatever capacity you can.**” Haislet concludes.

For more information regarding User Groups, visit elite.com/resources/usergroups.