Implementing Thomson Elite Enterprise
Do you really know what you’re in for?

Abstract: Elite Enterprise is a massive system composed of several core modules as well as an ad-hoc collection of third-party tools that must work together seamlessly. Implementing Elite requires knowledge of not only Elite itself but also all aspects of your firm’s operation. A considerable amount of planning and development with the right people in place is required to create a smoothly-working, productive and efficient system.

“Know Thyself”

In the first Matrix film Neo is shown a Latin sign hanging over the Oracle’s kitchen door that reads “Temet Nosce” which he is told means “Know Thyself”. Before embarking on an Elite implementation the most important first step to ensuring a successful project is to likewise “know thyself”. A standard Elite Enterprise system will touch all aspects of your firm’s business and legal practice. Unless you are fully aware of how your firm operates, who the users will be, what they want to achieve and what they expect from the new system you risk ending up with an environment that does not fill the firm’s needs and a dissatisfied user community.

A common miscalculation is to assume that this is “just another accounting system”. This is typically the case for firms switching from an old legacy DOS system that inherently had many limitations. Even a copy of QuickBooks from the local drug store may have more power than your old system and Elite goes far beyond those. That being said, you should keep in mind that Elite itself is the product of a long history that has roots in Unix terminal-based systems. Some of the legacy aspects of the core Elite product will pop up from time to time such as its ability to only produce plain text reports and restrictions on page width that reflect the limitations of the dot-matrix printers of the 80’s.

Know Your Resources

To avoid these pitfalls you must ensure you have the right resources. In particular, you need someone who knows what Elite can do and can map those abilities to your firm’s desires and true requirements. An Elite install tends to be a parade of various specialists and third-party consultants who operate completely independent of each other with the level of coordination dependant upon your Elite project manager. Unless the project manager is involved from the very first discussions of your move to Elite, you should not assume that the project manager or the individual implementation consultants will be able to see the big picture of what your firm is trying to achieve. For this reason some firms will bring in outside assistance or train an in-house person to act as the overall project guru.

Your in-house or outsourced project guru should be familiar with Elite terminology and know immediately when a topic is brought up how this will affect your use of the system. For example, Elite has the concept of a “superbill”
which must be designed and developed properly or your ability to respond to special client billing requests will be severely curtailed.

**Know Who’ll Be In Charge**

You should also have a very good idea of who will be in charge of the system once it is up and running. The maintenance of a large Elite system is a full-time job and many firms have underestimated the amount of work required resulting in overloaded Information Technology departments. Ongoing tasks include bill format development in both Enterprise as well as the Whitehill Document Studio, report development in FRx, IQ reports or any of the other reporting tools Elite provides as well as monitoring the many daily, weekly and monthly maintenance operations that run as part of a normal operating Elite system. There should be at least one person on your staff who is very familiar with Structured Query Language (SQL) as much of the troubleshooting and upkeep will take place using this language.

It is also easy to fall into the trap of just replicating old policies and procedures without taking advantage of the full power of an Elite system. A major goal in your migration should be the identification of inefficient and/or inaccurate processes and you should be prepared to replace these with procedures that work with the system instead of against it.

**Know Which Does What**

Once you’ve identified what you want the next question is which module will do which job. An Elite Enterprise system is comprised of core modules that handle billing tasks including time and cost entry, financial tasks including General Ledger and Account Payable, conflicts and records management. There is then a whole slew of extra modules that add additional functionality such as automated report generation, case management, client relationship management or extend the ability of the existing modules such as the Document Studio that turns Elite’s plain-text reports into presentation-quality documents or Webview that provides users of Elite with a browser-based interface.

Each of these modules can take from one day to two weeks to implement and can have similar user training timelines. Implementing Elite should be looked upon as a long-term project and you should not be in a hurry to do everything all at once. A new install should be a balance of absolutely critical requirements and enough additional modules to provide identifiable short-term benefits to the firm.

One of the methods that will assist in identifying required modules will be the overall organizational structure of your firm. Having offices in multiple cities or countries will impose specific technical as well as legal requirements. Additionally is the management of your firm centralized or not? The Webview browser interface can greatly assist in the former case as no client software is required to be installed on each user’s computer and Elite can be accessed from anywhere. However, you will want to control who has access to what abilities within the system and this must be designed using a combination of security controls within the Elite core system as well as design functions carried out to hide menu choices that are not relevant to the current user.
Know the Connections

The other aspect of an Elite install that is greatly underestimated is the interfaces with the other systems in your firm such as cost management products, third-party vendors such as couriers and any network services such as Intranets and Extranets. Installing an Elite system adds a whole new level to this mix and keeping everything in synch can either be very easy if planned well or become an absolute nightmare if not. Fortunately Elite is an open system that aids in the creation of connections with outside systems and products such as IntApps Integration Appliance can make the connections painless though at a fairly steep price.

Know the Right Time

The final question when working towards an Elite implementation is when the best time to make the migration will be. Having gone through the prior steps you will now have a sense of the enormity of what you are about to undertake. You should look at your fiscal year and identify the time when business is slowest. Although it may seem to make sense to switch over the change of a new fiscal year, converting over New Year’s brings a whole set of critical problems such as user training schedules conflicting with holidays and the challenges of year-end closing. Another way of thinking is to consider the worst case and look at when it will be easiest to switch back to your old system should the need arise. In the end, the continuation of your business is the most critical factor in this decision. There may still eventually be some running of parallel systems and the related overhead. However, experience has shown that this is rarely an impediment to a successful rollout.

Knowing When To Give The Go-Ahead

Only once you have a clearly planned document of the what, the who the how and the when should you agree to the commencement of the implementation. You must keep watch on the progress of the project through its entire lifecycle. Internal and external meetings must be held regularly and you should insist on regular reports. These may seem obvious but it doesn’t take much to derail an Elite project by having one status meeting missed or one report delayed.

The implementation of Elite Enterprise may well be the largest technology project your firm will undertake. It may fundamentally change the way your lawyers capture their time, the secretaries communicate with clients, the accounting department produces your bills and administration manages the firm. Elite is the sum of many disparate parts that unless conceived and integrated as a consistent whole will end up increasing overhead, costing the firm more money and reducing efficiency ultimately affecting firm profitability. However, with the right people in the right place Elite has the power to have a profound effect on the firm as a whole.

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