

Thomson Reuters Firm Central

Firm Central Implementation Process

Thank you for purchasing Firm Central®. You've made a smart move by choosing a practice management software that will centralize and simplify your workday.

Below is a general overview of what to expect next. For most firms, the entire Firm Central implementation process – from introduction and installation through training – takes approximately 30 – 45 days. But every firm is different, and we customize the process to meet your firm's unique needs. So let's work together to make sure we do what's right for your firm.



STEP 1

INTRODUCTION



Your Thomson Reuters Sales Representative will discuss your firm's unique needs with the Firm Central Project Manager assigned to your firm.

- Give you an overview of the process
- Schedule the installation and setup appointment
- Discuss your setup and training needs

STEP 2

INSTALLATION AND SETUP



Your Firm Central Project Manager will call to help you install and set up Firm Central. This 60-minute consultation may include:

- Installing desktop integration plug-in
- Discussing in greater detail your firm's setup needs (e.g., training preferences, level of data-migration support needed, etc.)
- Scheduling next steps (data migration, initial training, etc.)

STEP 3

DATA MIGRATION



Import and upload your firm information into Firm Central. This will begin by the assigned Project Manager Firm Central trainer assisting with scheduling the initial data migration kick-off meeting with the Project Manager for the Data Migration.

The data migration is broken down into 5 Phases:

- Phase 1: The Firm Central waiver will need to be filled out and signed accordingly. Next, the Project Manager will work with the customer to export the data and review their client and matter information. An initial plan will be discussed and executed. Sign off is required.
- Phase 2: The Project Manager will work diligently on reformatting the data getting it in a proper Firm Central format. Once completed, the Project Manager will review the data with the customer to confirm the data meets the customer's approval. Sign off is required.
- Phase 3: After the data is reviewed and confirmed, the Project Manager will import a sample size of contacts, clients and matters into Firm Central. Sign off is required.
- Phase 4: Once the sample size is confirmed, imported, the Project Manager will carry out the remaining migration of the contacts, clients, and matters into Firm Central. Once the migration is completed, an email will be sent out stating the migration was completed. Sign off is required.
- Phase 5: The Project Manager Firm Central trainer will assist with the Accounting Chart of Accounts as needed by the customer.

STEP 4 PRODUCT TRAINING

Comprehensive training from your Firm Central Project Manager is tailored to meet your firm's specific needs and may include:



- 30- to 60-minute WebEx or over-the-phone training sessions
- Topics such as time and billing, accounting, calculating deadlines, matter management, and document assembly
- Self-help resources also available

STEP 5 ENSURING YOUR SUCCESS WITH ONGOING SUPPORT

Once your firm is confidently up and running with Firm Central, your Project Manager will discuss your firm's needs with your Firm Central Product Specialist, who will:



- Offer your firm additional product training tailored to the needs of your practice
- Conduct periodic check-ins to see how things are going
- Schedule advanced training for seasoned users, and beginner training for new members of the firm
- Be available for any Firm Central product-related questions you may have

For assistance in the following areas:

- > **Customer Technical Support**
- > **Questions about your Thomson Reuters bill or invoice**
- > **Firm Central Time & Billing**
- > **Other Product Questions**

Call **1-888-287-8537** and follow the prompts

For self help Firm Central user guides and video tutorials visit the Firm Central support page online at legalsolutions.thomsonreuters.com/law-products/solutions/firm-central/support

For Firm Central customer support, go to firmcentral.com/support

To order or for more information, contact your representative at **1-888-287-8537**.

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