

## CLIENT TESTIMONIAL

# Wiggin and Dana LLP

## Navigating the Best Path to New Practice Management Software with Expert Guidance

Wiggin and Dana is a full-service law firm with 150 attorneys and 200 timekeepers. From ten East Coast offices, the firm represents clients nationally and globally on a diverse variety of matters. Serving clients ranging from Fortune 500 companies, family businesses and estates, and IP creators, the firm prides itself on offering unparalleled excellence in client service and value-driven results.

### Starting the transformation journey

Wiggin and Dana uses Elite Enterprise practice management system (PMS). But with the planned sunset of Enterprise in 2022, the firm knew it needed to identify a suitable replacement. Jandie McSweet, director of finance at the firm, explains Wiggin and Dana's decision to begin the selection process.

"It takes quite a long time to not only make a decision about which software to select, but also to implement and roll it out," she explains. "A lot of firms have begun the transition process or are already finished. We decided it was time to jump in with both feet and get started."

### Charting the course with expert guidance

To help the firm assess its options, Wiggin and Dana turned to Wilson Allen's technology transition advisory services. Led by Wilson's business of law and technology consultants, this

practice helps firms plan all aspects of a firm's transition to critical new software, including practice management systems. Wilson offers advice and consulting to address all stages of the transition, including defining the overall technology strategy, system and vendor evaluation, transition planning and preparation, and system implementation.

"When we decided to start the evaluation process for our transition, we didn't feel we were in a position to do it on our own," McSweet explains. "I spoke with several consulting groups about their transition-related services. Wilson Allen has a great deal of experience with software migrations, and I've had many positive experiences working with them. So, it made sense for us to work with them on our project."

### Building a map to assess needs

Starting with a formal needs analysis, Wilson engaged with stakeholders at the firm to determine the key

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Wiggin and Dana LLP**

**Building on a long-standing positive relationship, Wiggin and Dana engaged Wilson to execute the firm's two recent Elite Enterprise upgrades and to develop the firm's Design Gallery templates. The firm looked to the same team to support its PMS replacement initiative.**



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requirements for a new PMS and advice on its approach to evaluate contenders. “Wilson suggested questions to ask when evaluating potential systems that were specific to our firm and how we run it. These were questions we wouldn’t have necessarily thought of on our own. They encouraged us not to rule out any systems, and they also provided us with direction on what features a system would need to have to be appropriate for us,” McSweet explains.

In its strategic advisory role, Wilson Allen also recommended internal changes that would streamline the transition process. For example, Wilson Allen’s business of law consultants determined that Wiggin and Dana’s finance department would need additional resources for a large-scale PMS implementation to be successful. Wilson also advised it would be more cost-effective and efficient for the firm to bring on and train internal resources before the implementation than to rely on temporary contractors for the duration of the project.

“In our industry, any new position needs to have clear-cut justification. The insight from an independent third party like

Wilson went a long way in helping us assess our needs,” says McSweet.

### **Provisioning for the firm’s needs**

With close guidance from Wilson, Wiggin and Dana are currently pursuing deep-dive software evaluations with a shortlist of vendors in the running for the firm’s new PMS.

“I highly recommend that other firms perform a needs analysis when setting out to choose a new platform,” says McSweet. “It adds so much value that I can’t even put a price tag on it. It isn’t always easy to get objective information from vendors. They’re inclined to focus on the positives. Wilson Allen has seen and worked with so many systems; they can help us see our options more clearly. We can’t get that kind of insight anywhere else.”

### **Reaching a new horizon as part of the “Wilson family”**

Even more than technical knowledge and expertise Wilson brings to bear on behalf of its clients, McSweet notes it’s the quality and dedication of the team itself

that make the biggest difference in the eyes of her firm.

“The people that work for Wilson have been doing these types of projects for years – and it shows,” she explains. “Once you start working with them, they get to know you and your firm. They really do care and understand. And they remember. You don’t have to reinvent the wheel every time you talk to them. They do everything they can to let you know that you are part of the Wilson Allen family now.”

**For more information on how Wilson Allen can help with your migration or integration projects, contact us today.**

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