

Is it Time to Upgrade to Microsoft Office 2010?

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By Sue Keno and Nancy Kruzel

As Microsoft prepares to roll out Office 2010, law firms should consider whether to invest in the latest version of the software. The answer is: It depends. It depends on the current state of your firm's hardware, what version of Office you are currently using, how your firm's other software applications integrate with an upgrade and--perhaps most importantly--your technology budget and goals for 2010. There are no clear-cut answers, so firms should consider their own unique situations, variables and priorities.

The Latest Version of Office

Last July, Microsoft introduced the technical preview of Office 2010, and the beta version appeared in November. While Microsoft initially forecast that the upgrade would be available in the first half of 2010, it is more realistic to expect it by the fourth quarter.

Office 2010 will feature extended file compatibility and user interface updates. According to Microsoft, the Office 2010 suite is designed to make work flows more efficient; to effectively use Web applications to make work available anywhere; and to make collaboration with others much easier.

When considering whether to upgrade to Office 2010, Outlook's integration with Exchange Server 2010 may be a consideration for some firms. Microsoft has rolled out a test version of Exchange Server 2010, which is designed to reduce deployment costs; simplify high availability and disaster recovery; ease administration and decrease dependence on the help desk; provide greater mobility and flexible access; decrease inbox overload and increase productivity; transform voice mail; simplify compliance; offer safeguards for sensitive information; and reduce the risk of malware and spam.

Your Firm's Hardware and Operating System Situation

For some, the decision about whether to upgrade to Office 2010 may depend on where your firm is in its hardware contract. For firms that have contracts expiring later in 2010, it may make sense to go ahead with the upgrade to the latest version when it becomes available, rather than re-load older versions of software onto new machines. However, it is important to bear in mind that Microsoft has not pinpointed an exact release date for Office 2010--if contracts expire in the next few months, you may have no choice but to reload your current version of Office or upgrade to Office 2007 as an interim step before moving to Office 2010. For firms that still use Windows XP, upgrading to 2010 may not be an option, since the newest software program will probably not run efficiently on the older operating system.

Your Current Version of Office

Many law firms are still using Office 2000 or Office 2003, so their choices may be between forging ahead with Office 2007 or jumping straight to Office 2010.

For some firms, licensing and support may be the key consideration when deciding between Office 2007 and Office 2010. Firms that utilize the Microsoft Software Assurance program, which provides consulting services, training, web support and technical resources, have different options than firms that do not. Firms that do not use Software Assurance and have an older version of Office may want to consider purchasing Office 2010 and skipping over Office 2007.

The learning curve is another issue--Office 2007 and Office 2010 are strikingly different from the 2003 version, while Office 2010 has a more similar look and feel to Office 2007. This is particularly true when it comes to the "ribbon," the Office Fluent User Interface that replaced the traditional menu and toolbars in Office 2007. Firms that are upgrading from Office 2007 to 2010 will have fewer training issues than those that are still using Office 2003 or Office 2000.

Integration Issues

Integration issues should always be a concern for any law firm considering new technologies. Law firms tend to use far more software applications than most other professions, including time and billing, document management, client relationship management, calendaring and the like, so firms must test all other applications against an Office upgrade, then test them again. These third-party applications will require patches or updates in order to work seamlessly with Office 2010. If law firms decide to go with the latest version of Office, they will need to communicate beforehand with their vendors to ensure that all applications will function without a hitch during and after the installation of Office 2010.

Proper planning is key, but so is testing. Testing should extend beyond the IT department to include support staff, since they will be the ones putting the applications through their paces in the real-world environment. If they decide to upgrade to Office 2010, law firms should consider creating a pilot group of support staff that use the range of third-party applications and have them test every piece of software before it deploying firm-wide.

IT Support and Adoption

Once software is installed and thoroughly tested, the real work may begin. "Selling" new software to admin staff and attorneys should be an ongoing process. In the current economic environment, many attorneys and staff are feeling stressed and overwhelmed, so significant changes in software may be a tougher sell. On the other hand, some attorneys and staff may have extra time now to devote to training. You should consider the situation at your firm and

within different practice groups when planning for possible training.

Budgetary Issues

Now more than ever, law firms need to get the biggest bang for their technology buck. It is not the time to roll out a new software program that may be buggy or have integration issues. For firms with limited IT budgets, the more-proven Office 2007 could be the smarter choice.

Regardless of the decision your firm makes about which version of Office to consider, preparation is the key. Firms need to prepare for any changes and market new programs to staff and attorneys. Planning is extremely important, to ensure that the integration proceeds smoothly and the firm employees can reap all of the benefits they expect--and that they have paid for. Everyone at the firm should be educated about the reasons for any changes in software, what they can expect, what sort of support they will receive and how an upgrade will make them more productive and help them do their jobs even better. Otherwise, upgrades will be more expensive, drawn-out and painful than anyone anticipates.

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