

Probate Software: Training, Leadership and Support

Training

Charles Christian Quote

Charles Christian, the doyen of legal software technology, in his chapter on training in the 'Probate Practitioner's Handbook' (The Law Society, 2006) writes, '*left to their own devices, fee earners will often claim that they are 'far too busy' to attend training and then complain that the software is 'hopeless' when they later discover that they do not know how to use it.*'

Training is much underrated

Training to use software is much underrated by most firms. It is an area where many firms try to make savings. By doing so, they risk shooting themselves in the foot. Trying to save money on training is a false economy. The result is that fee earners and support staff will not be able to use the software properly. The consequent risk to the firm is a wasted investment.

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It is important to actively use the software

This however is only half the story. Even more important than training is for fee earners and support staff to actively use the software after training. Becoming familiar with the software is as important as the initial training. In a regime with weak or laissez-faire leadership, fee earners will often be tempted to go back to their old and inherently inefficient ways of dealing with estate administration, and ignore the benefits of a dedicated probate system.

History is littered with the detritus of those who refused to learn

Most of us enjoy the easy familiar routines. Learning how to use a new software system is a nuisance, no matter what the potential benefits might be. It is even worse when we are obliged to suffer a temporary decline in our productivity until we are familiar with the new system. History is littered with the detritus of the failures who refused to learn and adapt to the new because it was too much trouble.

Leadership

Enduring the learning curve

Strong departmental leadership would insist on fee earners and support staff enduring the learning curve. People do not expect it to take as long as it often does, sometimes three, four or five weeks. It is nevertheless the only way to ensure the success of a new system. The alternative is to risk failure and a waste of the money that you have spent.

Those who fail to learn will blame the software

Your probate team who fail to learn the software will of course blame the software. I have observed this phenomenon like watching a car crash in slow motion, while the head of department ignored all the warnings.

Most firms are blessed with strong and responsible leadership

Fortunately most firms are blessed with strong and responsible leadership. The more usual refrain in this instance is, "We don't know how we managed before we got the new probate system."



"Leadership experience? I have 13 people following me on Twitter!"

Support

Support is a fundamental component of a good software solution, albeit often overlooked by many buyers. Lack of training increases the importance of support. This is particularly so with probate software, since probate is primarily an accounting

function, while many solicitors still mistakenly think of probate as a case management function.

The bulk of estate administration is about finance

The bulk of estate administration is about collecting and collating the finances of the deceased estate in such a way so that an accurate set of accounts can be easily produced and the myriad of inheritance tax forms can be automatically populated with the financial data that has been entered into your probate accounting database.

Case Management is the easy part of probate work

Case management is the easy part of probate work. It involves keeping track of the tasks involved, and outputting a series of relatively standard letters and oaths. All the easier if the financial data is held in an accounting database with which the case management component is integrated.

Support from your supplier is fundamental

In view of the sheer complexity of probate work, understanding the tax rules, and how to treat the financial data, increases the importance of support, and being able to readily contact your software supplier for assistance. It is important that your probate software supplier can assist you in knowing how to treat ISAS and PEPS, listing the market value of equities and their dividends, calculating the cash value to the beneficiary who does not want shares, accounting for an abatement of assets, listing the foreign shares and calculating the tax due under the double taxation agreement, and more recently, how to deal with FATCA.

Quality of support from your supplier who has previous experience of probate work

In order to provide you with the quality of support to understand these questions, it is fundamental that your probate software supplier's support team have previous experience in this area of work, and can provide relevant and reliable answers,

Isokon

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Alternatively visit www.isokon.com

Isokon was founded by Gregory van Dyk Watson in 1999. The company has invested 44,000 man hours in development of the product over the last 15 years.

The company is currently the leading supplier of software for Probate and Private Client work. Isokon is used by 36% of law firms who do private client work. It is used by more than 2,000 individual users. It is used for the most complex estates, as well as basic estates.

Isokon is based on an accounting database engine with an integrated Isokon case management component.