



# Implementation & Support Guide

**How your firm is supported during and after your switch  
to Osprey Approach**

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# A note from our implementation team

Switching case management providers or implementing new software is challenging, which is why many law firms stay with underperforming solutions. Concerns about data migration, staff training, and selecting the right product are common, but we guide you through every step to ensure success from day one.

We provide best practices on data cleansing, workflow optimisation, and feature recommendations tailored to your legal specialisation. Our Customer Success team offers ongoing consultancy to maximise software usage, while unlimited telephone support, 24/7 access to our online Academy, and all-inclusive training ensure your team is always supported.

Investing time and money in a new system is significant, and we want you to get the most out of it. Our implementation process includes system setup, tailored training, and clear communication throughout, ensuring you hit the ground running with Osprey's powerful features.

Our experienced team will guide your firm through the implementation process, offering advice and support. We also provide a comprehensive guide to help with planning, addressing common challenges, and ensuring a smooth transition. If you need more information, your Customer Success Manager is here to assist.

We understand that implementing new software takes time, but with Osprey, you'll receive continuous support to ensure your firm's success. How we plan and execute the transition will directly impact when you experience the full benefits of your software investment. With over 30 years of experience, we've helped countless law firms transition from outdated systems to powerful solutions that scale with them.

At Osprey, we make running a law firm easier. Our dedicated team ensures a smooth switch, mapping out key stages, responsibilities, and expectations to keep everything on track for a successful go-live and beyond. With our expert guidance, your firm will unlock the full potential of its new system, enhancing efficiency and driving growth for years to come.



Alex Hiscutt - Head of Product & Professional Services



Rebecca Graystone - Senior Project Manager

## Osprey Approach is trusted by law firms across the UK



**NEWNHAM & JORDAN**  
SOLICITORS

**THE LAW FACTORY LLP**  
YOUR LEGAL CASHIERS

**Milner Elledge**  
Family Law Solicitors

**pavilion row**

**ChildCare** LLP

**FarnworthRose**  
SOLICITORS

**Preuveneers LLP**  
SOLICITORS WITH NOTARIES





## The Osprey implementation process explained

We know implementing any technology into a firm can feel overwhelming. Fear of the unknown and managing change are the top two concerns for teams, and when left unmanaged can create tension and resistance to new processes. We can alleviate initial concerns by outlining what an Osprey Approach software implementation project looks like. Our implementation process is tried and tested, so you can be confident that you're in safe hands.



**1.**

Welcome session



**2.**

Process review



**3.**

Project planning



**4.**

System configuration



**5.**

Data migration



**6.**

Training



**7.**

Go-live



**8.**

Post-implementation  
review



## Welcome session

To kick-start the project, we host a welcome session where you'll meet your implementation team. The session aims to help us get to know your business better and for you to be clear on how the project will play out.

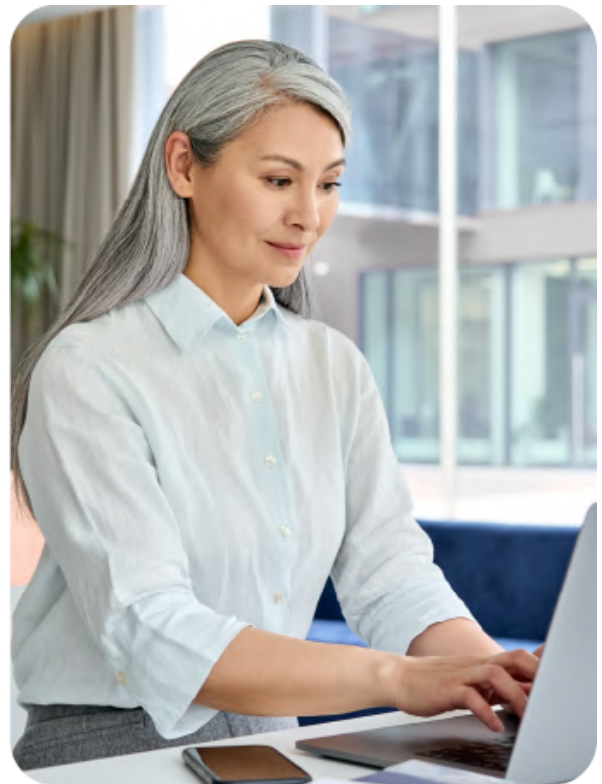
We'll discuss what you hope to achieve, the key drivers for the project, your firm's goals, and your current processes. We'll take you through the key project stages and outline initial expectations and requirements to get the project off to the best possible start. We'll also discuss options for importing existing data and how you want to go live.

This is a great opportunity for you and your team to ask any initial questions or raise any concerns about the process before it begins.

## Existing process review

Your Osprey project manager will shadow your teams, across all departments, to get a deeper understanding of your current operations. This has three major benefits.

Firstly, it helps us gather the information we need to configure the Osprey system to your needs. Secondly, it helps us tailor the training sessions for your team based on their current technical knowledge and software use. And lastly, it helps us to identify potential improvements to your procedure that'll help you increase efficiency and meet your goals.





## Project planning day

The project planning day is where the details begin, and a full project plan and scope can be created. The day is split into a morning and afternoon session to ensure all the details are covered.

First, we'll cover a quick overview of the Osprey solution so all key members from your firm have a base understanding of the software. This is key for defining terminology and functionality so it's easier to discuss data migration and process mapping.

Then we'll discuss your existing data that you want to migrate to Osprey. We'll review the data in detail to understand how it'll be transferred, when that will take place, how it'll look in Osprey, and how it is mapped. User profiles are set up in this session so we can schedule the appropriate training. It'll allow us to identify user groups based on role, business functions, and learning types. This helps us group teams together for initial training sessions.

By the end of the project planning day, all project actions, responsibilities, and deliverables are agreed so everyone is prepared.



## System configuration

Using the information we gathered during the project planning stage, our team will set up your database and configure all the necessary settings, features, integrations, and functionality specific to your firm. Part of our initial setup includes preparing your letterheads, two standard documents, and your bill templates to get you started.

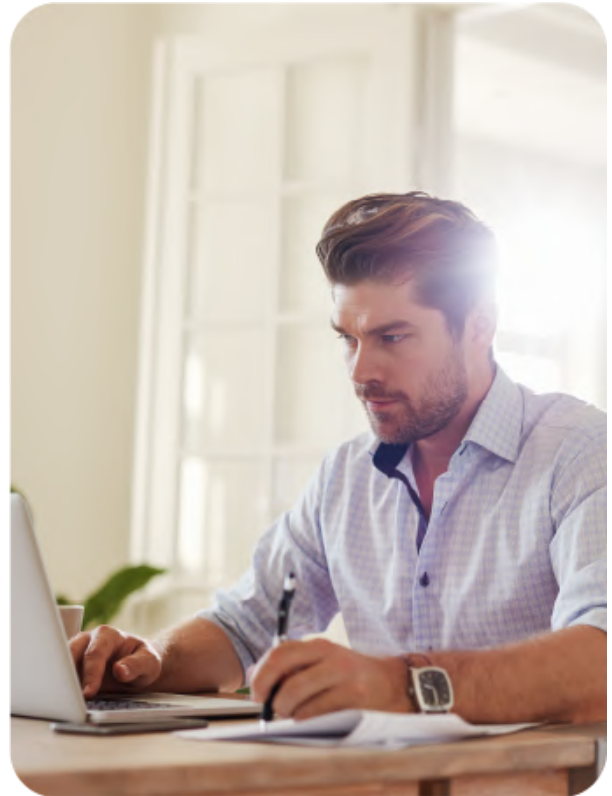
## Data migration & verification

We have migrated data from a wide range of case management solutions, for hundreds of firms, so you can be confident your data is in safe hands.

Data migration is a crucial stage during the project, which is why we customise the data migration to each firm, depending on the format and complexity of the data you wish to import.

We also recommend best practices for cleansing your data before importing it to Osprey. This will help you get the most from the system.

Before the data is imported, it'll go through verification and import procedures for quality assurance. Before go live, once the data has been migrated, we'll hold a remote session to review the data and ensure the figures balance correctly to guarantee a smooth go live.



## Training

To improve engagement, we offer a blended learning programme which offers trainer-led sessions, interactive online courses, how-to videos, and written guides. You'll have 24/7 access to The Osprey Academy where you can learn at your own pace and test yourself on various training modules. Your firm will also have access to our training site so you can feel confident navigating the system before go live, which will help to alleviate any fears.

Training will be based on user profiles and will help to group teams based on existing skills, progress, and key role functions.

Unlimited training is included for the lifetime of your contract, so you're entitled – and encouraged – to take as much training as possible. It's impossible to learn everything about a new system during the implementation phase, so to maximise success we recommend scheduling ongoing, regular training sessions for the whole team.

## Go Live

With your staff trained and your data migrated, you're ready to go live. Go live can look different for everybody; depending on the size and complexity of your firm you can simply switch to using only Osprey, go live in certain departments first, or go live with elements of Osprey separately.

You'll be assisted and supported by your Project Manager at all times to ensure everything runs smoothly and any first-day-queries can be answered.

During your initial go live phase, your firm will be on our 'high priority' list which gives you an elevated Service Level Agreement (SLA), so any support calls logged will be answered with a high priority status.



## Post implementation review

To ensure the implementation of Osprey has aligned with your firm's goals and expectations, your Project Manager will check back in with your approximately three months after your go live day. This allows enough time for things to settle and for users to gain everyday experience using Osprey.

We will review the support queries logged to see if there are any trends that can be resolved with further training. We discuss adopting and implementing new or additional features and we conduct a Q&A with your team to see if we can provide any hints and tips.

It's from here that your firm will no longer be considered as a 'live' project and continuous support and training will come via our support and account management team.



# Implementation

Switching to Osprey is made easy with the help of our dedicated implementation team.

From day one, you'll be supported by an experienced project manager who will guide you through the entire process, ensuring a smooth and efficient transition. Our team works closely with you to minimise disruptions and ensure you get the most out of Osprey from the start.

As part of the implementation process, we'll configure the system to meet your firm's specific needs. This includes setting up workflows, importing your data, and customising document templates. We will also review your existing processes and software, offering recommendations to improve efficiency and ensure everything is set up correctly

"Sometimes, when you're restricted to a couple of days training it's hard to implement. The training with Osprey is all included and we can fit it around our working day"

Nicola Houston, Operations Director

Pavilion Row

## Our implementation services



### Dedicated Project Manager

Your dedicated project manager will guide you through every step of the implementation process. They'll ensure a smooth transition by working closely with your team to manage setup, data migration, and system configuration.

### Configuration & set up

Osprey will be tailored to fit your firm's specific requirements. This includes setting up custom workflows, document templates, and account settings that align with your practice's processes. The configuration ensures a smooth and efficient operation, enabling your team to work more effectively from day one.

### Data migration

Our experienced team ensures a smooth, secure migration of your existing data into Osprey, minimising disruption to your practice.

### Comprehensive training & support

Your team will receive tailored training, including role-based courses. During go-live, you'll also have priority access to our in-house support team to ensure a smooth transition

For a complete list of services, and answers to our FAQs, view our [implementation web page here](#).

# Training

**All inclusive, unlimited training is included as standard because confident users equal bigger returns for your firm.**

Unlimited training is included as standard because confident users lead to better results for your firm. With ongoing access to training, your team will master Osprey's features and functionality, allowing them to work smarter and more efficiently. Osprey helps your firm boost productivity, streamline workflows, and maximise your return on investment.

"It's been really easy to get training booked in and support from Osprey. Unlike other companies where you might wait days for a response, Osprey will email you straight away and keep you in the loop."

Georgia Smith, Senior Paralegal  
Milner Eldridge

## Our training services



### Role-based training sessions

To ensure your firm is set up for success your team will attend role-based training sessions with our expert trainers to ensure they understand the fundamentals of Osprey and your team are confident for go-live.

### On-demand training courses

Looking to re-learn the basics or implement brand new features, you can access on-demand, digital training courses that help you maximise your knowledge and expertise of Osprey Approach.

### Group training sessions

Attend our weekly, trainer-led, group training sessions whenever you need to refresh your skills, enhance your abilities, and learn new features.

### The Osprey Academy

View an extensive library of online, on-demand how-to guides and tutorial videos that will provide instant support and advice on every feature. [Visit the Osprey Academy.](#)

For a complete list of services, and answers to our FAQs, view our [training web page here](#).

# Customer success & support

## Partnering with you for long-term success

At Osprey, we believe that true partnership goes beyond software. Our dedicated Customer Success team works closely with you to ensure your firm is continually supported in achieving its goals. With a proactive approach and personalised guidance, we help you make the most of Osprey's capabilities, ensuring it evolves with your firm's changing needs.

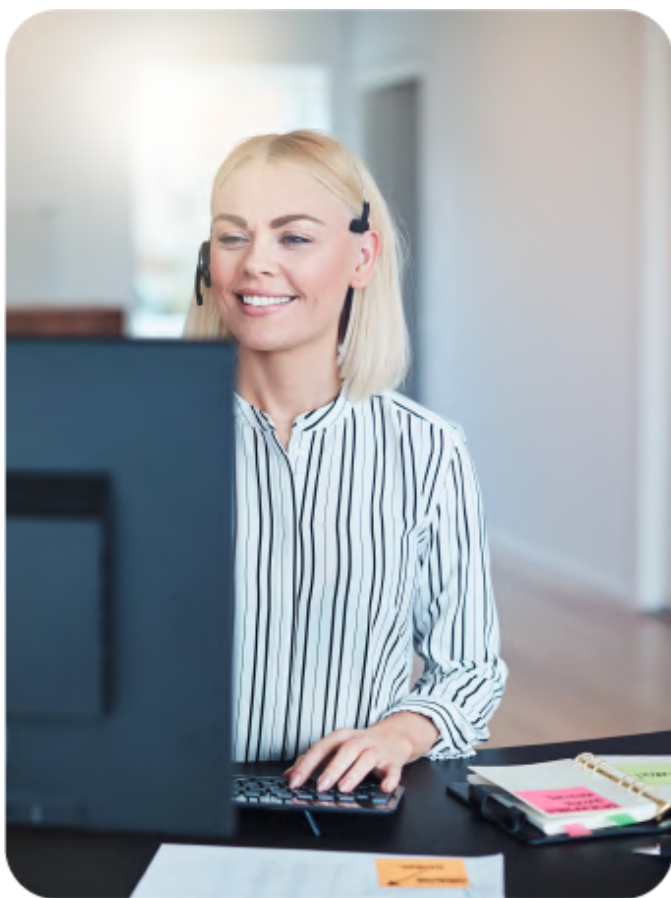
Our Customer Success team is dedicated to helping your firm achieve its goals by offering personalised support and proactive check-ins. We work closely with you to ensure Osprey adapts to your evolving needs, providing expert guidance on best practices, resolving challenges, and keeping you informed about new features. By aligning Osprey with your firm's objectives, we help maximise its value and long-term impact.

"Osprey are client centric and do the best for their clients by providing a proactive and prompt service. I would say Osprey has one of the best customer services in case management for solicitors."

Yash Dubal, Director

A Y & J Solicitors

## Our support services



### Personalised check-ins

We provide regular check-ins to offer guidance, share best practices, and help your firm maximise the benefits of Osprey's capabilities.

### Customised optimisation

Our team offers tailored strategies to enhance your processes, ensuring Osprey continues to deliver real results for your firm.

### Telephone-first support

Osprey offers telephone support from 08:30 to 18:30, providing prompt, personalised assistance for any queries or issues.

### On-demand support

Access the Osprey Academy 24/7 for instant help through guides and tutorials, ensuring quick answers whenever you need them.

For a complete list of services, and answers to our FAQs, view our [support web page here](#).

# Security

## Protecting your law firm's data with robust security.

At Osprey, we understand how important your firm's data is. That's why we've built a secure platform with layers of protection to keep your information safe. Our system is hosted in UK data centres that follow the highest security standards, with features like biometric access controls and 24/7 monitoring to keep your data secure.

Osprey also helps you stay compliant with key data protection regulations by ensuring that your data is stored and managed in line with industry best practices. With our reliable platform, you can be confident that your firm's data is safe, secure, and protected against cyber risks.

"Clients want three things: fantastic results, in the least amount of time, for a good price, and Osprey enables me to balance those three key areas; quality, efficiency, and value."

Katie Archer, Office Manager  
Burlingtons Legal LLP

## Our security services



### Secure cloud hosting

Osprey's data is securely hosted in UK-based data centres, ensuring your firm's information remains protected and compliant with industry regulations. With robust security measures in place, you can trust that your sensitive data is safeguarded against unauthorised access and cyber threats.

### SSL encryption & firewall protection

Your data is encrypted and safeguarded by an advanced firewall, ensuring protection against cyber threats and unauthorised access.

### Real-time syncing

Your data is backed up and synced between two locations to ensure accessibility, even in case of disruption.

### Compliance with data protection regulations

Osprey helps ensure your firm's data is stored and managed in line with industry standards, making it easier to stay compliant.

For a complete list of services, and answers to our FAQs, view our [support web page here](#).



# Why choose Osprey Approach?



"Osprey is used extensively to manage all areas of the firm. I can adapt and tailor the software to benefit us including creating letters and configuring the workflows. The workflows, document production, and the various time saving features in Osprey make our tasks at least three times faster every day"

**Kelly Cirillo**  
**Managing Partner**  
**Preuveneers**

[Read the full case study here](#)



"A key reason for choosing Osprey was because the training and support was all included. We can call anybody, at any time, to ask questions. Sometimes, when you're restricted to a couple of days training it's hard to successfully implement the software, but when you know the support is there and you can fit it around your working day, it gives the team confidence."

**James Newnham**  
**Practice & Accounts Manager**  
**Newnham & Jordan Solicitors**

[Read the full case study here](#)

[View all case studies](#)

## Our customers report:

**2 hrs**

saved every day using  
workflows and document  
production

**70%**

of costs are saved on  
stationery, printing, and  
postage

**3x  
faster**

tasks are completed 3x  
faster with automated  
workflows

# Additional resources

We've included a few of our favourite articles, videos and guides below that share further advice and guidance on successfully implementing practice and case management software into your firm.

*Click the links below to download, view and watch.*

## **Build Better Habits webinar series**

The *Build Better Habits* webinar series by Osprey Approach explores the key strategies and tools SME law firms need to improve efficiency, enhance client service, and drive long-term success. Featuring industry experts, the series covers practical insights on leveraging technology, optimising workflows, and future-proofing firm operations.

[Watch all episodes on demand >](#)

## **Empowering Law Firm Leaders**

*Empowering Law Firm Leaders* is an interview series that shares the expertise, advice, and secrets from the sectors experts and law firm leaders. The series will discuss the current challenges and new ideas for SME law firms to help empower leaders, manage teams, and make running a law firm easier.

[Watch the interview series >](#)

## **Implementation challenges and solutions**

Download our guide to successfully implementing software into your firm to discover our top tips and advice on overcoming the common challenges law firms face.

[Download here >](#)

## **A guide to legal software implementation: 6 FAQs answered**

This article answers the six most frequently asked questions that we get from legal professionals who are looking to implement new practice and case management software. To help you choose the right solution for your law firm we cover timescales, costs, migrating data, and what to expect when implementing a case management system.

[Read article >](#)

## **Build better business habits**

Implementing a new practice and case management solution is the perfect time to review your existing processes to optimise for success. Discover our range of guides and articles on building better habits to run a successful modern law firm.

[Download guide >](#)

## **How to successfully migrate law firm software: Expert advice from Alex Hiscutt and Alex Simons**

In this episode of *The LawCast*, Alex Simons, host and Head of Business Development at The Law Factory, is joined by Alex Hiscutt, Head of Implementations at Osprey Approach, to explore the essential steps law firms must take before launching new software systems.

[Read article >](#)

## **A guide to legal software implementation: 7 factors that impact how long it takes?**

We've answered the top six frequently asked questions regarding legal software implementations.

[Read article>](#)