

Richard Nelson LLP Solicitors

Project Case Study

How Richard Nelson moved beyond a legacy practice management system and navigated the challenges of technological and organisational

Client
Richard Nelson LLP Solicitors

Go-Live Date:
February 2026

Project
Moving from LawFusion to Actionstep

About Richard Nelson

Richard Nelson LLP is a national firm of solicitors providing a range of specialist legal services to professionals, businesses and individuals throughout England and Wales across 16 regional offices and via the latest communication technology.

The firm prides itself on providing clients with a personalised service, combining robust legal representation with approachability and straightforward, honest advice.

Richard Nelson LLP has expertise in assisting businesses, professionals and private individuals with a variety of legal issues, including professional disciplinary matters, regulatory investigations, specialist criminal defence, transport and road traffic offences, litigation and private client work.



Marie Dancer
Managing Partner | Richard Nelson LLP

"We wanted a cloud-based practice management system backed by a provider committed to ongoing development and integrations that would future-proof our firm."

Why Richard Nelson moved to Actionstep

Richard Nelson's decision to replace its practice management system wasn't initially driven by a desire for change. Having used its existing platform for many years, the firm wasn't actively seeking an alternative. However, following a series of mergers involving its software provider, it became increasingly clear that the platform was being treated as a legacy product, with limited development and little appetite for new integrations.

Rather than allow these limitations to restrict its future ambitions, Richard Nelson began exploring the market for a modern, cloud-based practice management system that would continue to evolve, support new integrations and provide the flexibility needed for future growth.

Following demonstrations of several platforms, the firm selected Actionstep and partnered with Nexian to support its transition.

Involving staff from day one

Richard Nelson recognised the importance of involving its people in the decision to change systems.

Before selecting a new platform, the firm sought feedback from employees about the functionality they valued and the capabilities they wanted from a future practice management system.

However, as with any organisation-wide transformation, there were practical limits to how many people could participate directly in the selection and decision-making process.

The challenge was therefore not simply choosing the right platform, but helping employees understand the reasons for the change and become confident working within it.

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Reflections on the implementation

"Changing a practice management system is one of the most significant operational changes a law firm can undertake.

While selecting the right technology is important, introducing new processes and ways of working across an established business presents an entirely different challenge.

For Richard Nelson, the timing was never going to be perfect. Fee earners continued to manage live matters, urgent transactions and demanding client commitments throughout the transition.

There was also the challenge of accommodating different levels of technical confidence and familiarity with the previous system.

Some employees adapted quickly to Actionstep and immediately recognised the advantages of the new platform. Others found themselves missing aspects of the previous system, including individuals who had originally supported the decision to move.

In many cases, those preferences reflected familiarity rather than a genuine functional limitation. Processes that had become second nature over many years naturally felt quicker than learning an entirely new way of working.

Reflecting on the implementation, two areas emerged that the firm would approach differently."

Marie Dancer
Managing Partner | Richard Nelson LLP Solicitors



Training that reflects how people work

The firm would place greater emphasis on role-specific training, using practical scenarios that reflect employees' day-to-day responsibilities.

While understanding the broader functionality of a new system is valuable, confidence develops when people can apply that knowledge to the work they undertake.

Allowing more time before go-live

Richard Nelson would also allow additional time to develop and refine workflows, processes and supporting materials before the system became operational.

Having these elements more fully established would help employees become comfortable with the platform and reduce the need for adjustments during the early stages of adoption.

However, the firm also recognised that no implementation can ever be entirely perfect. At some point, an organisation must commit to moving forward, accepting that refinement and improvement will continue beyond go-live.

Beyond go-live

Following its transition to Actionstep, Richard Nelson continues to work with Nexian through an ongoing support retainer, allowing the firm to access expertise and support as it refines its processes and develops its use of the platform.

Replacing its legacy practice management system required a considerable investment of time and effort across the business. The transition presented challenges, but it also created an opportunity to reconsider established processes and build a more adaptable technology foundation.

Today, the firm has a platform that continues to develop, with greater potential for integration, innovation and future growth.

Richard Nelson's experience offers a valuable lesson for other law firms considering a similar transition: choosing the right technology matters, but giving people the time, training and support to embrace it is just as important.

Advice for other firms

5 tips for a successful migration to Actionstep

- Involve staff from the start, through a working group, demonstrations and input from each department.
- Allow more time to set up and test the system before go-live.
- Put more weight on testing and training for each role.
- Keep supporting people after go-live.
- Keep up with Actionstep's regular releases and use what helps the firm.





About Nexian

Nexian is Actionstep's 2026 Global Partner of the Year, supporting law firms with practice management system implementations, data migration, configuration, integrations, training and ongoing managed services.

Ready to explore Actionstep?

Call: 0121 289 3434
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