

Walker Foster Solicitors

Project Case Study

Client
Walker Foster Solicitors

Go-Live Date:
April 2026

Project
Moving from Proclaim to Actionstep

Involving staff from day one

For Managing Director Maxine Heppenstall, the firm's people and culture have always been a priority. A new practice management system (PMS) meant managing big change without losing the culture the firm had worked hard to build.

A new system affects almost everyone in a law firm. From opening matters and preparing documents to managing day-to-day tasks, familiar processes can change considerably.

> *"The biggest lesson for me is that changing a PMS is every bit as much about people as it is technology."*

The firm set up a working group and involved staff from the start, through demonstrations, input from each department, testing and training. Teams helped shape how the system would be used instead of having new processes handed to them.

Actionstep Implementation Data Migration **Change Management & Adoption** Testing & Training

Why Walker Foster moved to Actionstep

Walker Foster Solicitors had used Proclaim for years.

As the firm grew across multiple sites, it needed better integration with its other systems, simpler processes and stronger reporting.

The firm chose Actionstep, and Nexian handled moving the firm's data across, setting up the system, testing and training.

From client-centric to matter-centric

Proclaim is built around the client. Actionstep is built around the matter, so documents, tasks, time and billing all sit under the matter. That difference meant looking again at how each department worked, rather than copying the old setup across.

People had relied on Proclaim for years, so it took time to adjust.



Maxine S.Heppenstall
MD | Walker Foster Solicitors

"We knew Proclaim was becoming dated and, as a growing multi-site firm, we needed to invest in technology that would help us work more efficiently and keep us moving forward."

Lessons learned along the way

What Maxine would do differently

Two stages of the project matter most here. The first is the build, when Nexian's consultants configure Actionstep around how the firm works, including matter types, workflows, documents and billing.

The second is user acceptance testing (UAT), when the firm's staff test the system using real examples of their work, in their own roles, to identify anything that doesn't work as expected. The aim is to resolve problems before go-live and help staff understand how the new system will change their day-to-day work.

Maxine is open about what she would change. She would allow more time for both stages, with greater emphasis on testing and training for each role, so staff have time to practise and feel confident before go-live.

> *"If I was doing it again, I'd allow much more time for the building phase and UAT and put more emphasis on role-specific testing and training."*

She also stresses communication. Staff need to understand why the change is happening, have the chance to raise concerns, and feel supported once the new system goes live.





After go-live

Walker Foster went live with Actionstep in April 2026. Go-live was the start of using the system, not the end of the project, and the firm has kept refining its processes and how it uses the platform.

> *"There have inevitably been some frustrations and things we've had to work through, but we've learned a lot along the way and we're still developing how we use the system to get the best from it."*

That fits how Actionstep works. It is updated regularly, with new functionality released throughout the year, so the system a firm goes live with keeps getting better. Firms that get the most from it keep up with those releases, try what is useful and keep improving how they work.

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?

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