

The Court Innovator's Implementation Workbook



Interactive **Tips** and **Tools**
from **Industry Experts**

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About the Workbook

Technology implementation in the court system is more than a technical upgrade—it's a transformation of how justice is delivered. Whether you're launching a new case management system or modernizing legacy processes, success depends on thoughtful planning, strong leadership, and strategic collaboration.

This workbook is designed to guide court professionals through phases of implementation, offering practical tools, expert insights, and real-world examples from peers who've led successful projects. From identifying internal champions to managing vendors, documenting workflows, and capturing data, each section equips your team with actionable strategies to stay organized, meet deadlines, and drive lasting change.

Whether you're just beginning or refining your approach, this resource will help you build a foundation for success and navigate the complexities of court technology implementation with confidence.

Note: This workbook is not comprehensive and should be used as a starting point. It's important to talk to your technology vendors for complete checklists.

#1 - The Role of Internal Champions in Driving Successful Implementation

When it comes to implementing new technology in the court system, success hinges not just on the solution itself, but on the people who carry it forward. Every court technology project needs a committed internal leader who understands the mission, believes in the vision, and can rally others around it. This person is your project champion.

Why Champions Matter

A project champion isn't just a cheerleader; they're a strategic force. Here's why their role is indispensable:

- **Internal Alignment & Advocacy**

- Champions ensure the project's goals are clearly communicated across departments. They help staff understand the "why" behind the change, translating abstract benefits into tangible improvements for daily workflows.



- **Decision-Making & Momentum**

- Projects without champions often stall. Champions keep things moving by managing issues, making timely decisions, and serving as the court's voice in vendor meetings and the vendor's ally in internal discussions.

- **Contextual Expertise**

- No one understands a court's operations better than someone inside it. Champions bring critical insight into workflows, pain points, and political dynamics. They bridge the gap between vendor solutions and court realities, ensuring the technology fits actual needs.

Tips for Identifying and Empowering Champions

Choosing the right person to represent your court as the project champion during a technology implementation project is essential. Since it's a strategic leadership role, there are several important things you should do to ensure your champion is successful.

1. Look for respected staff who understand the court's technical and human sides.
2. Choose someone who communicates well across departments and isn't afraid to challenge the status quo.
3. Empower them with decision-making authority and a clear mandate to lead.

During the development of this workbook, two leading court innovators with experience leading technology projects at their courts were consulted. They understand the importance of preparing staff for change. Their advice? Start with empathy. Help your team see how the new system will improve—not disrupt—their workday. Build buy-in early, and reinforce it often.

Dive Deeper

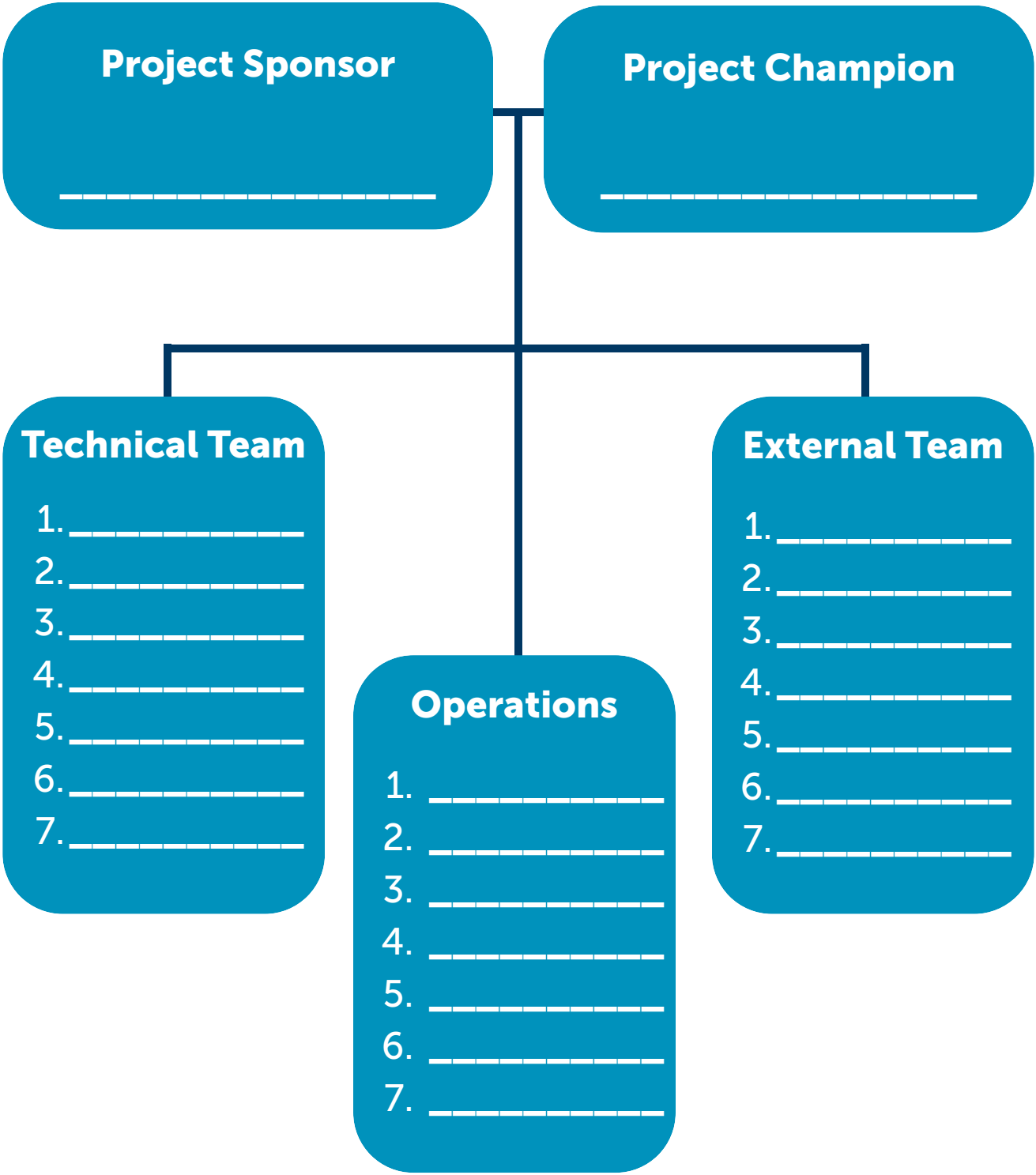
Explore more on this topic in the blog post: [5 Reasons Courts Need a Project Champion for Successful Tech Implementations](#)— a deeper look at the traits of effective champions and how to cultivate them.



Outline Your Team and Project Champion

Use the flowchart on the next page (Figure 1) to begin identifying your court's internal champions and defining their responsibilities. The flowchart will serve as a guide as you consider what roles will be essential to your technology project.

Figure 1



Begin planning your implementation team here.

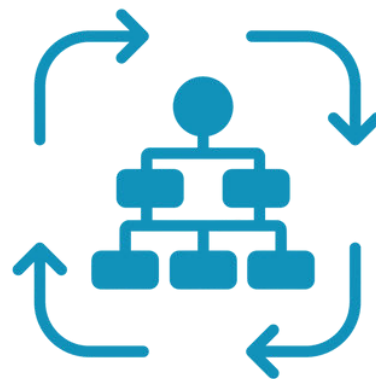
#2 - Documentation: Building a Foundation for Implementation Success

Preparing your court for a technology implementation project begins long before the first line of code is written or the first training session is scheduled. Successful implementation of new technology depends on how well your court understands its current state and how clearly it defines its future.

Why Preparation Matters

Documenting current processes and data isn't just a formality—it's a strategic necessity. Here's why this step is foundational:

- **Preserves Institutional Knowledge:** Legacy systems and informal workflows often hold critical operational knowledge. Documenting these prevents essential knowledge from being lost during the shift to new technology.
- **Ensures Accurate Data Migration:** Before migrating to a new CMS, courts must map, clean, and validate existing data. Without this, you risk data loss, corruption, or misalignment. A clear understanding of what data exists and how it's used ensures a smooth transition.
- **Supports Workflow and Caseflow Design:** Effective caseflow starts with understanding how cases currently move through the system. This insight helps design workflows that reflect real-world operations and avoid disruption.
- **Facilitates System Configuration and Testing:** A well-documented baseline allows the implementation team to configure the CMS to mirror actual usage. It also provides a benchmark for testing, so systems perform as expected before launch.
- **Enables Change Management and Training:** When staff can see how their current tasks will evolve, it reduces resistance and confusion. Documentation becomes a powerful training tool, helping users understand what's changing and why



Risks of Skipping This Step

Skipping the groundwork might seem like a shortcut, but it's a fast track to trouble. Courts that dive into implementation without documenting current processes and data often face costly setbacks, frustrated staff, and systems that don't fit. The risks aren't just technical; they are operational, legal, and cultural. Here's what can go wrong when preparation is overlooked:

- **Data integrity issues:** Mismatched or incomplete data can lead to legal and operational problems.
- **Workflow breakdowns:** Without a clear map of current processes, the new system may introduce bottlenecks or compliance gaps.
- **Increased costs and delays:** Fixing problems post-launch is far more expensive than addressing them during planning.
- **Low user adoption:** If the system doesn't reflect how people work, they won't use it effectively.



Our blog post, [Four Tips for a Successful CMS Implementation](#) provides more insights on this topic.

Start Your Pre-Implementation Planning

Use the following checklist (Figure 2) to assess your court's preparedness. This tool will help you identify gaps, assign responsibilities, and ensure your team is ready to move forward with confidence.

Figure 2

Pre-Implementation Readiness Checklist

Process Documentation

- ☐ Inventory all current workflows and case types
- ☐ Document how cases move through the court system
- ☐ Identify informal or undocumented processes
- ☐ Capture pain points and inefficiencies in current workflows

Data Preparation

- ☐ Identify all data sources and legacy systems
- ☐ Map existing data fields to new CMS structure
- ☐ Clean and validate data for accuracy and completeness
- ☐ Define data migration rules and priorities

Stakeholder Engagement

- ☐ Identify a court-side project champion
- ☐ Establish a cross-functional implementation team
- ☐ Communicate project goals and timeline to all departments
- ☐ Schedule regular check-ins with vendor and internal teams

Change Management Planning

- ☐ Develop a communication plan for staff and stakeholders
- ☐ Create training materials based on current vs. future workflows
- ☐ Plan for user testing and feedback sessions
- ☐ Define success metrics and post-launch support strategy

#3 - Managing Vendors and Consultants

Effective vendor and consultant management is critical to the success of any court technology implementation. While external partners bring expertise and tools, it's the court's responsibility to guide the relationship, set expectations, and ensure alignment with internal goals.

Common Pitfalls and How to Avoid Them

Working with vendors and consultants can unlock powerful capabilities, but only if the partnership is managed with clarity and care. It's easy to stumble into avoidable issues that slow progress, inflate costs, or strain relationships. By recognizing these common pitfalls early and applying proven strategies to sidestep them, your court can build stronger, more productive collaborations from day one.

1. Unclear Roles and Responsibilities

- **Risk:** Task confusion, delays, and duplicated efforts.
- **Solution:** Use a RACI chart or project hierarchy to define who is responsible, accountable, consulted, and informed.

2. Lack of a Vendor Communication Plan

- **Risk:** Misunderstandings, missed deadlines, and scope creep.
- **Solution:** Establish a structured plan with meeting cadence, reporting formats, and escalation paths.

3. Failure to Manage Expectations

- **Risk:** Misaligned assumptions about ownership and resources.
- **Solution:** Set and revisit expectations early. Document deliverables, timelines, and dependencies.

4. Inadequate Performance Monitoring

- **Risk:** Issues go unnoticed until they become critical.
- **Solution:** Use KPIs, SLAs, scorecards, or dashboards to track vendor performance.

5. Overlooking Cultural Fit

- **Risk:** Miscommunication and friction despite technical competence.
- **Solution:** Choose vendors with justice sector experience and a relationship-first approach.

Communication Strategies to Align Internal & External Teams

Even the best technology can falter without strong communication. When courts and vendors operate in silos, misunderstandings multiply and progress stalls. That's why aligning internal and external teams is not just helpful—it's essential. Clear, consistent communication builds trust, keeps everyone informed, and ensures implementation stays on track.

The strategies below will help your court foster collaboration, streamline updates, and maintain momentum throughout the project lifecycle.

- **Appoint a Court-Side Project Champion:** As discussed earlier in this workbook, this person acts as liaison, decision-maker, and advocate for both sides.
- **Create a Shared Project Hub:** Use platforms like Teams or SharePoint for real-time access to documents and updates.
- **Use Layered Communication:** A strategy that keeps stakeholders engaged by using multiple communication formats, such as:
 - **Executive Briefings:** Monthly updates for leadership
 - **Working Group Syncs:** Weekly tactical meetings
 - **Asynchronous Updates:** Dashboards, status reports, shared logs
- **Document Everything:** Meeting notes, decision logs, and action items ensure continuity and accountability.



Want Another Perspective?

Listen to our podcast episode ["Keys to Successful Court CMS Implementations"](#) with Equivant Director Jason Emineth to hear implementation insights from the vendor's side.

Outline Your Vendor Communication Plan

Use the template on the next page to build your own vendor communication strategy. It includes guided prompts to help define meeting cadence, reporting formats, and escalation paths.

Sample Vendor Communication Plan

Use the Communication Objectives table below (Figure 3A) to start planning out the objectives for your court. The first 3 have been filled out as an example.

Figure 3A

Communication Objectives	Notes
Ensure clear and consistent communication between the court and vendor teams.	
Facilitate timely decision-making and issue resolution	
Maintain transparency and accountability throughout the implementation process	

Use the Key Stakeholders table below (Figure 3B) to start assigning important project roles to staff at your court.

Figure 3B

Key Stakeholder Project Roles	Assigned Staff
Court-Side Project Champion	
Vendor Project Manager	
Court IT Staff	
Court Admin	
External Consultants (if applicable)	

Use the Communication Methods table below (Figure 3C) to plan your communication methods for the project. Common communication methods have been included, but feel free to add your own as well. Use the notes column to brainstorm when meetings will be, how often emails and status reports should be sent, etc.

Figure 3C

Communication Methods	Notes
Weekly stand-up meetings (virtual or in-person)	
Monthly committee meetings	
Project Management Platform (what are you using, what tasks should be added, etc.?)	
Email updates and status reports	
Decision logs and project trackers	

Use the Communication Frequency table below (Figure 3D) to plan out how often communication should occur so that clear expectations are set before the project begins. Some common communication types have been included as examples. Use the "Frequency column" to plan when and how often they should occur. Use the blank spaces to fill out any other communication type requiring a routine frequency.

Figure 3D

Communication	Frequency
Tactical syncs for working teams	
Leadership Briefings	
Ad hoc meetings	

Use the Escalation Protocols table below (Figure 3E) to get ahead of any unexpected roadblocks your project may encounter. With technology, the unexpected can happen. Use the “Notes” side of the table to develop protocols and standards for handling challenges as they arise.

Figure 3E

Escalation Protocols		Notes
Define escalation paths for unresolved issues		
Identify primary and secondary contacts for each stakeholder group		
Document escalation procedures in the project governance plan.		
How long should it take staff to address issues?		

#4 - Why Measurement Matters: Capturing Data Before, During, and After Implementation

After establishing your team, organizing your processes, and selecting a vendor, it's now time to outline a data measurement strategy.

In any court technology initiative, data is the backbone of measuring success. This section highlights the importance of capturing data at each phase of your project, provides a baseline data management strategy, and gives you a data measurement template that you can use to support your court technology project.

The Importance of Capturing Data

Capturing data at all stages of the project is vital to understanding the impact of your technology initiative.

By capturing pre-project data, you'll have tangible information about where your court started and a baseline to measure progress. By capturing data throughout the project, your team can track the real-time impact of the technology initiative and adjust along the way. Finally, capturing data at the end of your project will help your team evaluate success and show the long-term benefits the technology has on key processes.

Keeping data at the center of your implementation has broader positive impacts on courts. With implementation data, teams can align themselves with KPIs and project goals, which boosts overall efficiency. It also promotes transparency within the court, and by extension, the communities they serve.

"How will we know if this project is successful if we don't know what our baseline is?"

- Quote from an equivant interview of a Project Champion

Where to Start

Data measurement is an ongoing process. Although it might feel somewhat intimidating, it's a crucial step that will set your court up for long-term success. To help you get started, we broke down actionable steps you should take during each project phase to make sure data is properly captured.

This list is a great starting point, but not fully comprehensive. Talk with your technology vendor about best practices for capturing data.

Before the Project

1. Meet with your team to discuss the KPIs for your project.
 - a. Some common KPIs include:
 - i. Time to Disposition
 - ii. Trial Date Certainty
 - b. Look at your court performance metrics to find the most relevant KPIs for your team
2. Assign the role(s) of recording and reporting on data throughout the project.
3. Create a Data Tracking document with all KPIs and import your baseline data (or see the workbook page at the end of this section).

During the Project

1. Consistently check your benchmark datapoints on a predetermined schedule.
 - a. Monthly, bimonthly, quarterly, etc.
2. Ask critical questions and draw insights from relevant project data.
 - a. Are we behind/ahead of schedule?
 - b. Are project goals on track to be met?
3. Share data with relevant parties (internal team, vendors, stakeholders) to maintain consistent communication and make necessary adjustments.

After the Project

1. Reflect and compare data on KPIs from the beginning and end of your project.
 - a. Did you hit your success metrics?
 - b. What was the percent change on benchmark KPIs?
2. Present your data to leadership, funding partners, and other stakeholders to prove the value of your project.

"We were able to get \$300,000 earmarked from Congress to fund our project based on the data we collected."

- Quote from an equivant interview of a Project Champion

Start Capturing Data Now

To kickstart your data management, we've included our Data Documentation Template (Figure 4). Use it to identify key success metrics for your project and to record your court's current data. As your project progresses, update the chart at strategic checkpoints to track real-time impact and success.

Start documenting your pre-implementation data using the table below.

Figure 4

Metric	Pre-Project	Check-in 1	Check-in 2	Final

Lessons from the Field: How Strategic Implementation Brings Real World Success

Many of the steps outlined in this workbook were shared by real court professionals who saw positive project impacts firsthand. In the tables below, we've outlined some of the steps, actions, and results from their projects to help you plan and prepare for your implementation:

Examples from Court #1 - Court CMS Implementation Project

Step Taken	Results
Identifying a Project Champion	The selected project champion was able to fully dedicate themselves to the project, and their focus helped move the go-live up four months.
Capturing Baseline Data	The team captured KPI data during all stages of the project, and they were able to get \$300,000 in congressional funding based on their data insights.

Examples from Court #2 - Guided Interview-Style Software Update Project

Step Taken	Results
Documenting Processes and Pre-Project Planning	The project champion ensured that all parties, including court leaders, operations personnel, and IT, were present in project planning, so the project saw no major setbacks.

Conclusion

Implementing a technology project can feel overwhelming—but with the tools in this workbook, you'll be equipped to stay on track, keep your team aligned, and drive meaningful, long-term improvements for your court.

For continued guidance and inspiration, explore these expert resources:

- [Four Tips for a Successful CMS Implementation](#) – Practical strategies to set your project up for success.
- [Keys to Successful Court CMS Implementations](#) – Insights from over 100 successful implementations, straight from the field.
- [From Courtrooms to Computers: ODR Lessons from Massachusetts Trial Court](#) – A video podcast exploring digital transformation in the justice system.
- [The Importance of Data-Driven Government](#) – A deep dive into data quality, transparency, and integrity in public sector innovation.

About equivalent Court

equivalent delivers customer-centric solutions that simplify justice by boosting efficiency, streamlining processes, and improving communication in courts and justice agencies. equivalent's innovative technologies, including an award-winning case management system, have been developed by expert practitioners and have supported more than 350+ justice agencies in serving their communities efficiently, effectively, and equitably.



If you're considering the benefits of implementing new technology in your court, [contact us](#).