

Summary: Attorney and legal technology writer Jeffrey S. Lisson discusses the essential technology solos and small firms should use. All of the suggestions are based on Mr. Lisson's own experiences in solo practice and in his current small firm.

Essential Technology for Solos and Small Firms

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As we steam headlong into the second half of the first decade of the 21st century, this seems like a good time to examine what technology all solos and small firms need. Regardless of practice are, regardless of location, there are certain hardware, software, and technology practices all lawyers should have.

In this article, I give my views of the technology every firm should have and use. After all, a technology investment does no good if it just sits on a shelf.

1. A Good Tech Guy (Or Gal).

When I had a solo practice, I enjoyed tinkering with my office computers and network. But by doing it myself, I wasted more billable and family hours than I care to recall.

When I moved to my current small firm, no one knew much about computer systems. Instead, the firm had a "tech guy" it called whenever anything went wrong, when it bought needed new computers, and even when software updates arrived. He charges \$35 per hour for the time he's here.

We've since upgraded our network (we moved from Novell to Windows 2003 Server, and ran new Cat5 wiring), installed computerized case management, and put in place a hardware firewall/VPN solution for remote access. I set up the case management, but our tech did the other jobs. He tested everything at his home before installing it in our offices to prevent extended downtime, which I never could have done. I figure it would have taken me two to three weeks of work to do what he did in five days. It cost us about \$1,100 in labor, but I bill more than that most days.

Compare a tech's hourly rate to yours. Is there a false economy in doing the work yourself?

Granted, not all "techies" are as inexpensive as ours. But even \$100 an hour is a bargain if you can bill and get work done, and the tech job gets done right. Plus, someone other than you is responsible if it doesn't work.

Where do you find qualified techies? Word of mouth is one good way. Ours works for our local the local university; often, techies for schools and companies will moonlight. You may not have instant access to them, but since we dumped Novell, we haven't needed immediate response.

Though I miss doing a lot of the hands-on tinkering, I appreciate the time I can devote to law. Plus, I now have more time to play with our home wireless network, not to mention my kids.

2. Backup/Virus Protection.

I lump these two together because both protect you from catastrophe.

Backup is a time-consuming pain in the rear that has no appreciable value on a day-to-day basis. Except, that is, on the day your hard drive crashes.

How often should you back up your data? That depends how much data and work you're willing to lose. If you don't mind recreating a day's worth of documents, appointments, computerized time records, etc., then every other day is enough. But if you're like me, and by lunch you can barely remember what you had for breakfast, then daily backups are a must.

Good backup is a multifaceted solution:

First, I recommend mirrored hard drives on your server. "Mirrored hard drives" means that each drive contains an exact copy of the other. So if one drive fails, the other will take over. (I know a little about "RAID" configurations of hard drives, but for most of us, this is a job for your techie.)

Second, you need an off-site backup in case of a flood, fire, power surge, etc., that wipes out your office hard drives. I recommend removable or external USB hard drives. Use one for a weekly full backup, and others for daily incremental backups. Though online backup is convenient, it's too slow for most firms.

Third, you need backup software. On my laptop, I use Acronis TrueImage (www.acronis.com), though there are many good options. We use Veritas Backup Exec (www.veritas.com, now part of Symantec) on our server.

As to anti-virus software: You just can't be too safe. We have Norton AntiVirus Corporate (www.symantec.com) on our network. The best thing about this program is that it "pushes" updates out to each computer on the network, rather than relying on users to update themselves. It also uses "heuristics," which attempt to identify viruses based on their activity, rather than specific definitions. (There is some dispute as to the efficacy of heuristics; the stronger their use, the slower the computer runs and the more false positives the software generates.)

I also use Avast! Antivirus (www.avast.com) for the belt-and-suspenders approach. Avast home edition is free for personal use.

3. File Management.

Now we're getting to something that can give you tangible, daily savings and results.

By "file management" I mean where files are stored, and how you organize them. The better you organize your files, the less time you'll spend searching for the file you need.

We're all familiar with a file cabinet, file folders for each client, and subfolders for each matter. Seems to me the easiest thing to do is copy that system onto the computer.

In our office, we have a folder called "Client Docs" on the server. Within Client Docs, each client gets her own folder, and each client matter gets a subfolder inside the client's folder. For more information, download my article, "Where Are My Files?" on my web site, <http://www.lissonlaw.com/legal%20technology.html>.

4. Computerized Case Management/Time and Billing Software.

Rolodex? Buzz your secretary to get phone numbers and you disturb you and her. DayTimer? Every update has to be copied again at the office. Paper billing sheets? Double entry wastes time and money.

Computerized case management allows single entry of client information and appointments, which can be seen by anyone on the network. Phone messages and phone call notes are organized into the client's electronic folder. You can even keep time records that can export to a billing program, or work with an integrated billing system.

Our office has not fully implemented the single-entry approach, as the firm latched onto TABSIII from STI (www.tabs3.com) before we started using Amicus Attorney (www.amicusattorney.com) for case management. If I was working from scratch, I'd use Amicus Attorney for case management and PCLaw (www.pclaw.com) for billing. There's an easy-to-use link that updates both programs without double entry of data.

The time savings for attorneys and staff pay for the programs the first year.

When I was in solo practice, I didn't initially buy time/billing software. Big mistake. Contemporaneous capture of time spent, along with monthly billing, is the best way to get paid as much as possible for the time you actually work.

5. Laptops.

Even if you don't do presentations for clients or in court, attorneys should use laptops. They're more expensive than desktops, but many have almost all of the same features, and easily can be taken home or on an airplane. Though high-end notebooks can cost more than \$2,000, most attorneys can do with a laptop that costs \$1,200 or less. Just be sure to get at least 512 MB of RAM, and at least a 60GB hard drive. I just bought a HP Compaq nc8230, for about \$1,800.00, and I'm very pleased. Subjectively, it seems as fast as my partners' desktops. And I can take it home at night.

6. Telephone Headsets.

This is a must for attorneys and staff. End the cricks in your neck, or trying to write with one hand while holding the phone with the other. A good quality headset (try Avaya, www.avaya.com, or Plantronics, www.plantronics.com) makes life easier.

7. Digital Dictation System.

Microcassette tapes are unreliable. The tapes stretch, causing garbled recording. The tapes get lost (or at least I lost them). Tapes also limited by location; i.e., your secretary can't transcribe a tape in Dallas if you're in Florida, unless you FedEx it back.

A digital recorder allows you to e-mail recordings to your office from anywhere in the world. They never get garbled. And once you get the hang of it, they're easier to use with more options than a conventional recorder.

For more information, see my article, "Digital Dictation: You've Cut the Cord, Now Cut the Tape" on my web site, <http://www.lissonlaw.com/legal%20technology.html>. For recorders and transcription foot pedals that plug into the computer, try www.startstop.com.

8. Projector.

I often use a projector in court, and not just when a jury's present. After all, judges need to be persuaded, too. But I also use my projector for mediations, client and group presentations, and training sessions in use of software for our staff. There's just no better way to show information or demonstrate software to a group of 15 or 50. I've found clients appreciate the effort.

And, when I'm not using it at the office, I take the projector home to watch football games, movies with my wife, or Disney shows with the kids.

Be sure to buy a good-quality screen, too.

I recommend using a consultant, such as Boxlight, www.boxlight.com, to help figure out the specs you need and to sort out the technology. Cheap projectors now run as little as a few hundred dollars, though good ones that don't require dimming the lights remain higher.

9. Server-Based Network.

When I had a solo practice, I had a peer-to-peer network. Now, with three attorneys and five staff, our network uses a server running Windows 2003 Server. (If you don't know what I'm talking about, re-read item #1.)

For one attorney and one secretary, a peer-to-peer network is fine. But for three or more users, a server is the best bet, as it centralizes storage of documents and makes backup easier. We've found the Windows 2003 Server software to be the most stable software Microsoft has put out since MS-DOS. It hasn't crashed on us in more than a year.

10. Litigation/Knowledge Management.

Anyone that does complex litigation of any sort – family law, commercial, personal injury – knows how tough it is to keep track of facts, witnesses, documents, and the issues in the case. CaseMap, from CaseSoft, www.casesoft.com, is a great software program to keep track of everything related a lawsuit.

Most of these tools require some money up front. But pay a little now, save a lot later. Each is worth its weight in gold, and each will pay for itself many times over.

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