

BY JEFFREY S. LISSON



Everything You

# Need

# closer essential success

## Take a closer look at the technology-related resources that are essential for the success of solo practitioners and professionals in small law firms.

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*Editor's Note: This article originated in TechnoLawyer, a critically acclaimed online legal technology and practice management resource for lawyers, and is reprinted here with the author's permission.*

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**A**s we steam headlong into the second half of the first decade of the 21<sup>st</sup> century, there's no better time to re-examine the technological resources all solo practitioners and small firms should utilize. There are certain hardware, software and technology practices all lawyers should have – and use! After all, an investment in technology does no good if the item just sits on a shelf.

### **HIRING THE INDISPENSABLE 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 has a "tech guy" whom we called whenever anything went wrong, when we needed new computers and even when software updates arrived. He charges \$35 per hour.

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 guy handled the other jobs. He tested everything at his home before installing it in our office 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 technology professionals 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 properly. Plus, someone other than you is responsible if it doesn't work.

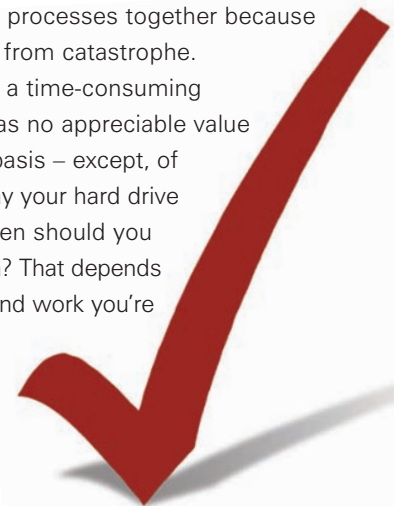
Where do you find qualified technology professionals? Word of mouth is one good way. Ours works for the local university; often, techies for schools and companies will moonlight. You may not have instant access to them, but since we dumped Novell, we haven't needed immediate response.

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.

### **FILE BACKUP AND VIRUS PROTECTION**

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

File backup is a time-consuming enterprise that has no appreciable value on a day-to-day basis – except, of course, 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.



## SHORTCUT

From virus protection and case management software to laptops and projectors, high-tech resources abound to ensure success for solo practitioners and legal professionals in small firms.

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, who by lunch can barely remember what I had for breakfast, then daily backups are a must.

Good backup is a multifaceted solution. First, I recommend "mirrored hard drives" on your server, meaning 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" hard drive configurations, but for most of us, this is a job for your techie.)

Second, you need an offsite 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](http://www.acronis.com)), though many other good options exist. We use Veritas Backup Exec ([www.veritas.com](http://www.veritas.com), now part of Symantec) on our server.

As for anti-virus software, you simply can't be too safe. We have Norton AntiVirus Corporate ([www.symantec.com](http://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. I also use Avast! Antivirus ([www.avast.com](http://www.avast.com)); the home edition is free for personal use.

### 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. The easiest thing to do is to copy that system onto a

computer. In our office, we have a folder called "Client Docs" on the server. Within Client Docs, each client gets his or her own folder, and each client matter gets a subfolder inside the client's folder. For more information, download the article "Where Are My Files?" from my Web site at [www.lissonlaw.com](http://www.lissonlaw.com).

### COMPUTERIZED CASE MANAGEMENT AND TIME AND BILLING SOFTWARE

Rolodexes, DayTimers and paper billing sheets often waste time and money. Computerized case management, however, enables 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.

If you're starting from scratch, consider using Amicus Attorney ([www.amicusattorney.com](http://www.amicusattorney.com)) for case management and PCLaw, ([www.pclaw.com](http://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 in the first year.

When I was in solo practice, I didn't initially buy time and billing software, which was a 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.

### THE LUXURY OF 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 they can be easily used at home or on an airplane.

Though high-end notebooks can cost more than \$2,000, most attorneys can make 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 60 GB hard drive. I just bought a HP Compaq nc8230 for about \$1,800, and I'm very pleased. Subjectively, it seems as fast as my partners' desktops. And I can take it home at night.

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### HANDY HEADSETS

Telephone headsets are a must for busy attorneys, legal administrators and other staff who develop cricks in their necks from trying to write or type with one hand while holding the phone with the other. A good quality headset (try Avaya, [www.avaya.com](http://www.avaya.com), or Plantronics, [www.plantronics.com](http://www.plantronics.com)) makes life a lot easier.

### DIGITAL DICTATION SYSTEMS

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

A digital recorder enables you to e-mail recordings to your office from anywhere in the world. The recordings also never get garbled. And once you

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](http://www.boxlight.com)), to help you figure out what you need. Inexpensive projectors now cost as little as a few hundred dollars, though good ones that don't require dimming the lights cost more.

### SERVER-BASED NETWORKING

When I had a solo practice, I had a peer-to-peer network. Now, with three attorneys and five staffers, our network uses a server running Windows 2003 Server, which hasn't crashed on us in more than a year.

For one attorney and one secretary, a peer-to-peer network is fine. For three or more users, however, a server is the best bet, as it centralizes storage of documents and makes backups easier.

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get the hang of it, they're easier to use, with more options than conventional recorders.

For more information, download the article "Digital Dictation: You've Cut the Cord, Now Cut the Tape" from my Web site, [www.lissonlaw.com](http://www.lissonlaw.com).

For recorders and transcription foot pedals that plug into the computer, try StartStop ([www.startstop.com](http://www.startstop.com)). Another popular vendor that can help you switch to digital dictation solutions from antiquated analog methods is TranscriptionGear.com ([www.transcriptiongear.com](http://www.transcriptiongear.com)).

### PROJECTORS

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 presentations and staff software training sessions. There's no better way to show information or demonstrate software to a group of five 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

### LITIGATION AND 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 each case. CaseMap from CaseSoft ([www.casesoft.com](http://www.casesoft.com)) is a great software program to keep track of everything related to a lawsuit.

Most of the aforementioned resources require some money up front. But if you pay a little now, you'll inevitable save a lot later. ✱

### *about the author*

**Jeffrey S. Lisson** is the civil litigator with the three-attorney firm of Carter & Boyd PC in San Angelo, Texas. He writes and lectures frequently on legal technology for small firms and solo practitioners, with an emphasis on practical systems and cost-effective solutions. His Web site, [www.lissonlaw.com](http://www.lissonlaw.com), features links and information about many of these issues. Contact him at [jlisson@carterboyd.com](mailto:jlisson@carterboyd.com).