

LEGAL MANAGEMENT

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CM Feature

COMMUNICATION AND ORGANIZATIONAL MANAGEMENT

How to Find a Mobile Workflow That Works for You

Introducing mobile options at your law firm can enhance daily operations

Everyone, including lawyers, is hooked on mobile devices. But instead of letting smartphones and tablets disrupt the workflow, law firm managers can use them to *enhance* it instead. By tapping into certain mobile programs and practices, lawyers and staff can end up being more productive than ever.



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“Not only does mobile technology help law firms provide better service to their clients, but it enables lawyers to better communicate with team members internally while fostering better collaboration with outside counsel.”

BETH THOMPSON
Business Development
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“Whether it is simply accessing email from a smartphone or tablet, or an attorney accessing client matters on the go, mobility has become an integral part of day-to-day operations for most law firms,” says Beth Thompson, Business Development Manager of Legal Solutions at [CDW](#). “Not only does mobile technology help law firms provide better service to their clients, but it enables lawyers to better communicate with team members internally while fostering better collaboration with outside counsel.”

The following are some tips for making a law firm more mobile-friendly, plus platforms that help lawyers and staff contribute to the success of the firm.

SMOOTHER PROCESSES

Apps can save a law firm time, money and energy while letting workers complete tasks on the go.

One such option is Clio. Andres Hernandez of [Wingman LegalTech](#) recommends this online practice management tool. It has tracking and billing features, as well as the ability to link certain tasks to staff members and monitor them. The makers of the platform promise SSL encryption, which means that every piece of data that travels between Clio’s and a law firm’s server is kept secure and private.

For legal research, there’s the [FastCase](#) app, which allows users to look at constitutions, cases, regulations, court rules and statutes located in the company’s database. Lawyers and researchers can do keyword searches and, like Google, the most relevant and important results will appear at the top of the page. There is also a tool that shows how many times a case has been cited, which can be critical when doing research.

*CDW***MANAGE CLIENTS WITH MOBILE PAPERWORK**

If law firm managers want to cut down on clutter, they should throw out the filing cabinets and pick up some tablets instead.

**QUICK HIT 1**

Law firm managers should only use cloud storage companies, software providers and apps that provide encryption, authentication and strong protection around their servers. They should also be monitoring for hacks and breaches on a constant basis.

“The cloud is much more secure than the typical law firm’s network.”

DAVID MOON*CompassPOINT*

Adriana Linares, a Law Practice Consultant and Legal Technology Trainer at [LawTech Partners](#), said firms are utilizing mobile devices to manage clients.

“[They are] using them as client-facing communication tools. Putting client intake forms or matter questionnaires on easy-to-use tablets and iPads are a convenient way for law firms to gather information from prospective or existing clients,” says Linares.

CALL-IN MEETINGS

When lawyers are on the go, they aren’t able to sit down with clients and take notes on the case. As an alternative, they can use [Call Recorder](#), an app that records an iPhone’s incoming and outgoing phone calls and stores them for later usage.

For firm-wide meetings, try [UberConference](#), an app that lets users share documents with colleagues while in the meeting, text individuals on the call, block out background noise if they’re not in the office, and share screens with other users if they’re on a tablet.

ACCESS ON THE GO

If lawyers or staff members are out of the office, they might not be able to access important files on the law firm’s network. However, the cloud makes this possible.

One cloud storage company is [DropBox](#). The firm’s files can be seen from anywhere at any time, but not by just anyone. DropBox offers encryption, and, additionally, it allows for its users to split up access and use password protection. For example, if partners at a firm don’t want secretaries looking at client information, they can put a password on the client’s files.

Other cloud storage programs include [Google Drive](#), [Box](#), [OneDrive](#) and [Copy](#). Law firm managers should investigate the best option based on their office’s needs and budget.

QUICK HIT 2

Strong passwords are everything. According to a Verizon study from 2013, the No. 1 cause of data breaches was weak passwords. Everyone in the office needs to create passwords that are difficult to guess and different from their other login credentials.

“If an attorney is adapting to new technologies it’s always a good thing because they can provide better services, be more efficient and lower overhead costs for clients. And that makes everyone happy.”

ANDRES HERNANDEZ

Winaman LegalTech



SAFETY MATTERS

When it comes to law firms, security is an utmost priority. Despite concerns to the contrary, the cloud in particular has been found to be safe to use.

“The cloud is much more secure than the typical law firm’s network,” says David Moon of CompassPOINT. That’s because cloud storage companies require strong passwords; networks may accept simpler ones, thereby making them more vulnerable to attacks.

Demetrios A. Eleftheriou, Senior Counsel of Privacy and Data Security at EMC Corporation, says law firm managers should make the cloud even more secure by choosing a cloud provider that allows for a user-defined encryption process. That means only the user has the ability to encrypt and decrypt his or her data stored in the cloud.

Along with encryption, the cloud also should have a risk-based authentication tool. Eleftheriou says that when a thief has stolen a user’s login information, the cloud should be able to detect that the login is not coming from the normal location. Then, the tool will deny access and present the user with a second authentication challenge. For example, this may be a personal question that only the real user would know the answer to, or even a required passcode that is sent to the user’s mobile phone.

One important thing not to overlook: Before law firm managers download apps, they need to do their due diligence and read the companies’ security policies, as well as contact them about the encryption and authentication they have in place.

DID YOU KNOW?

According to a study by Gartner, by 2017, half of all employees will be required to bring their smartphones to work. Law firm managers can get a head start on this trend by incorporating mobile devices into the workplace in a positive manner.

GOING MOBILE

Though going mobile requires its fair share of research and perhaps an attitude change in the workplace, in the end, it helps law firms perform better than they ever could in the past.

“Mobile devices give you more capabilities,” says Hernandez. “If an attorney is adapting to new technologies, it’s always a good thing because they can provide better services, be more efficient and lower overhead costs for clients. And that makes everyone happy.”

ABOUT THE AUTHOR:

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