

Solo and Small Law Practice Management Series 2
Part 1 Finance
Part 2 Technology

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Law Firm Technology:

hardware computer printer scanner, Software office suite, document software, phone, research tools

Hardware

#1

Hardware

- ABA 1.1 To maintain the requisite knowledge and skill, a lawyer should keep abreast of changes in the law and its practice, including the benefits and risks associated with relevant technology, engage in continuing study and education and comply with all continuing legal education requirements to which the lawyer is subject.
- ABA1.6(c) requires lawyers to "make reasonable efforts to prevent the inadvertent or unauthorized disclosure of, or unauthorized access to, information relating to the representation of a client."
- Desktop / Laptop
  - Virtual office, physical office, county bar, starbucks, password
- Mac vs PC vs ipad, surface pro $1,000 New vs used

Hardware

- Paperless office
- Printer/Scanner
  - MFC paperless office $100, Scansnap, $300
  - Industrial copier $3,000 used $15,000 new

Software

#2

Software

- Litigation versus transactional?
- Productivity Software
  - Microsoft office, Office online $100 a year or $150 student, Openoffice,
  - Acrobat Pro $300 $15 a month
  - Gimp versus Photoshop
  - Hotdocs, quick parts in word, mail merge
- Paperless office?
  - Need ocr software if not included Acrobat Pro
- Time tracking
  - Time matters, excel, time59 etc

Software

- MR 1.1 [2] A lawyer need not necessarily have special training or prior experience to handle legal problems of a type with which the lawyer is unfamiliar. A newly admitted lawyer can be as competent as a practitioner with long experience. … A lawyer can provide adequate representation in a wholly novel field through necessary study. [4] A lawyer may accept representation where the requisite level of competence can be achieved by reasonable preparation.
- Databases Lexisnexis, Westlaw, Fastcase, google scholar $100-400 a month
- MR 1.15 (a) Funds shall be kept in a separate account maintained in the state where the lawyer's office is situated, or elsewhere with the consent of the client or third person.
- Payments
  - Credit card, debit card, POS system? Squareup, paypal, stripe
  - Trust account, Law pay, law charge, to trust acct, not deduct charges, AIO
- Efiling
  - Federal Pacer
  - State Onelegal , Rapidlegal

Software

- All-in-one productivity software
  - Mycase, Clio, practice panther, rocket matter, amicus, casepeer for PI
  - Monthly fees $50 to $100 a month per user
  - Often includes Document assembly, calendaring, tasks check lists, payment processing, invoices, trust accounting

Internet

#3

Internet

- Web hosting
  - DIY squarespace, wix free
  - Pro wordpress $1,000 + monthly
  - Hosting bluehost, godaddy, hostgator$10 a month
- Facebook page

Telephony

#4

Telephony

- Messaging service for off hours calls
- Cell phone only?
- Landline?
  - VOIP landline
- Hybrid
  - Google voice number forwarding number

Storage

#5

Storage

- Model Rule 1.6(c) requires lawyers to "make reasonable efforts to prevent the inadvertent or unauthorized disclosure of, or unauthorized access to, information relating to the representation of a client."
- Can scan and store documents in cloud
  - Exception is estate plans! Need to hold original. Don't do it. Return to client.
- Dropbox, google drive, Gsuite, Microsoft onedrive, Amazon cloud

Choosing Practice Area(s)

#6

Assess your Practice





Solo and Small Law Practice Management Part 2: Operations

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May 11, 2019

Work Space, Personnel, Resources, & Document Management

PART 2

Work Space

- **Office space**
  - More expensive
  - Paying for "dead" space, i.e., conference room, support staff & waiting area,
- **Law suite**
  - Somewhat expensive
  - Paying for the space you need and shared common expenses / support, plus hourly usage
- **Virtual**
  - Less expensive
  - Tailored to your needs (work space, conference time, mail, reception etc.)
- **Home with Virtual add-on**
  - Should be least expensive
  - Back ground noise… dog barking, children playing, door slamming…

Work Space

- Dedicated and uncluttered space for work, file and document storage, without distractions
- Keep a picture on your desk across from you that will remind you WHY you are working—your family, goals, travel. Motivation is essential!

Regus

Novel COWORKING

FIRST CHOICE EXECUTIVE SUITES

BARRISTER EXECUTIVE SUITES, INC.

EasyOffices

*Examples only. We make no recommendation.

Office Equipment

- **Need to Have:**
  - Computer
  - Phone
  - Laser Printer
  - Scanner/Snap-scan

- **Nice to Have:**
  - External Hard Drive
  - Ergonomic Chair (Symphony)
  - Computer Monitor (or 2)
  - Ergonomic Mouse & Keyboard
  - Standing desk/adapter

Software

- Need to Have:
  - Microsoft Office Suite
  - Practice Management Software (Clio, MyCase, CosmoLex, etc.)
  - Bookmarking software (Adobe Pro ($);

    Libre Office (free, *like* Adobe)

- Nice to Have:
  - Adobe / Pro
  - Quickbooks Business / Pro
  - Turbo Tax
  - Timeslips
  - Backup confidential storage, off-site

Services

- **Need to Have:**
  - Dropbox
  - Google Voice
  - Skype
  - Domain Name & Hosting – Bluehost
  - Printer – Moo.com & Gotprint.com

- **Nice to Have:**
  - Postage On Demand – Stamps.com
  - E-fax – Nextiva
  - E-signature - DocuSign
  - Online Scheduling – Time Trade
  - Virtual Receptionist – Call Ruby
  - Xero Accounting Software
  - Bookkeeper – Kahuna Accounting
  - Graphics – 99 Designs & DesignCrowd
  - Miscellaneous – Fiver.com

Supplies

- **Need to Have**:
  - Pens
  - Paper
  - Red Swingline Stapler
  - Tab folders

- **Nice to Have:**
  - Center hole punch
  - Pressboard fastener folders
  - File buckets
  - Signature flags
  - Misc. stamps (“Copy”, “Sign here”, “Exhibit”, “Confidential”)
  - Bates Stamp (unless you have Adobe Pro)

Personnel

Remember, "Overhead is EVIL!" Especially when you start out.

For now, it will be just You!

Office Manager, Custodian, Bookkeeper, Marketer, Paralegal AND Attorney

Consider: an hourly Law Clerk, Assistant

Also consider a financial planner… and definitely use a tax preparer (EA or CPA)

justia.svg

Resources

- Law Libraries
  - SD Public Law Library
  - Local law schools

FindLaw

THOMSON REUTERS

CEB
Your Partner in Practice

LexisNexis

JUSTIA

Google scholar

OnLAW

casetext

*Examples only. We make no recommendation.



How to Conduct Free Legal Research Online

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