

Technology Decisions for the New Small Law Firm

- **Budget:** What's your technology budget?
- **Hardware** - Assess your hardware needs.
 - Computer. Consider carefully whether you should use your personal laptop for your law practice. Your whole practice hinges on having a reliable computer and for myriad reasons, both practical and ethical, you should have a separate computer for work and home. (Mac users: Please see [How to Choose a "Mac" Computer](#)) Always consider purchasing the most memory and processor speed that you can – especially if frequent upgrades are not possible. As hardware and software upgrades occur over time, so does the need for additional memory and speed.
 - Printer/scanner/copier. An all-in-one may be sufficient if you are starting from the ground up with little or no clientele, but print and scanning quality can suffer with a cheap all-in-one. For example, if your printing needs are heavy, a dedicated printer is the way to go. If you have co-workers, an all-in-one as your only solution is not practical.
 - Scanners. If you plan to routinely scan paper documents and store them electronically, look for a good scanner that will fit on your desk. Fujitsu Scansnap and Epson currently make reliable small sheetfed scanners capable of scanning up to 50 or more pages at a time.
 - Copiers. Most lawyers find that leasing a copier that comes with service (and some include paper and toner) from a local supplier is the most cost-efficient solution. Investing thousands in purchasing a copier for a law office is not a good option.
 - Printers. HP printers continue to be solid printers for the law office. You may choose to lease a printer or you may find an affordable printer that meets your needs. As with computers, you're looking for a "real" office printer.
 - Docking station/port replicator or "dock." You can use a laptop and still have large monitors, an external keyboard and more, easily, with a dock. The external devices stay plugged into the dock waiting for you to plug your laptop in (effectively making it a "desktop" computer). Look for one compatible with your brand of laptop.
 - UPS. Uninterruptible power supply. A mere power strip is not sufficient for your precious office tech (including your internet router). A UPS can protect you from power surges and even act as a backup running on batteries if the power goes out.
 - Backup drives. External hard drives are essential for an onsite backup of the contents of your computer. Consider a less-destructible model such as the ioSafe.
 - Telephones. Most small law offices save money with VoIP (voice over internet protocol). Use one of the phones your VoIP provider (which is usually your internet provider, but not always) recommends.

- Faxing. Faxing in small offices is often accomplished with a scanner and an online fax service rather than a fax machine. The online service comes with a separate fax number. Look for one that offers a local area code if possible.
- Answering. Machines or service? Ask yourself: if you are a client seeking a lawyer would you hire the one with an answering machine picking up calls or the one with a human being you can talk to? You may not be able to afford to hire a receptionist, but don't skimp on having a good answering service, like Ruby Receptionists or CallExperts.
- Dictation. If your typing skills lag, voice recognition software has come a long way. Use your smartphone or a preferred dictation recorder, transmit the dictation to a subscription service like SpeakWrite and get typed documents back in hours.
- **Research your tech:** Don't buy before you do some research. Read online reviews and find out how your hardware stacks up against the competition. Also make sure the bargain you've found isn't a discontinued model.
- **Compare:** There are many online websites like Pricegrabber.com and Google Shopping to compare tech prices. Even if you buy your hardware locally, you'll know whether the price is fair.
- **Don't go cheap:** A laptop bought off the shelf in a big box store might be suited for light home use, but not for long hours in a legal practice. PC makers have "business" or "professional" class machines that are built for performance and reliability. Your livelihood depends on your computer. In general, don't buy a computer with an operating system (OS) that is at its end of lifecycle because a new version has come out, unless there are compelling reasons. A compelling reason could be that your research shows the new OS has poor reviews and upgrades are expected in the future. Just make sure your current OS can be upgraded later to the new version for free. Always consider customized options from the manufacturer over box items. It is easier to customize and get maximum memory and speed vs. what comes in the box. Also, some vendors who offer cheaper models of the same product don't offer the same warranty as manufacture. Remember "if it looks too good to be true...it probably is..."
- **Local purchasing:** Check with local computer repair stores. Many sell quality refurbished and new computers and offer service along with a warranty.
- **Warranties:** Ask what they do and don't cover before you buy. Different warranties sometimes are sold thru different retailers.
- **Networks:** With so much of what a law office does available through the Internet, many small law offices decide they do not need to purchase a hardware network server. This can depend on the software you use. For example, if you use software that doesn't have a cloud version, and you share this software with others in your office, a traditional network server may be your only option. Know the options available between cloud network providers. See Cloud Checklist.
- **Software**
 - Security software is #1. New computers come loaded with trial versions of security software, but research these carefully before you even start the "free

trial” period. They may not be the best on the market. If they fare poorly in ratings, uninstall them and install a superior product. Look for total internet security against malware as well as safe browsing, password protection, firewalls, encryption, and more.

- Office suite. No law office functions without Microsoft Word. Word is part of the Microsoft Office Suite, which can include Outlook (email, calendars and contacts), Access (database system), Excel (spreadsheet), PowerPoint (presentations), OneNote (notes and collaboration tool) and more. Office 365 is the brand name for a subscription service to the Office Suite. Office 365 Business Premium includes the dual option of having Word (and the rest) available both online and as a download to your computer (in case you lose your Internet connection). Keep in mind that by using Office 365, your work in Office products is backed up for you to OneDrive file hosting in the cloud. 365 offers multi-user licenses, mobility, collaboration tools (Skype, document, calendar and contact sharing), and more than what is offered with standalone versions of Office. There is also 365 for Mac. Microsoft is moving away from standalone versions and shepherding users to 365.
- After you’ve settled on Microsoft 365, look to any practice-area specific products you need. If you practice in real estate closings, there are specific products you can purchase.
- Case or practice management software. This software is designed for use by law firms to handle client contact information, check for conflicts, keep calendars and reminders, store email and documents related to the client, take notes, track time, send bills, and some even come with their own accounting (accounts payable, receivable, payroll). It’s a great idea to start your new practice right with practice management (PM) software.
- There are different kinds of PM – those you install locally on your work PC or servers and cloud versions (officially called SaaS, or Software as a Service). With SaaS, you use software that resides online all the time, and so does your data (although there are exceptions with some products that allow you to store data locally as well). Office 365 is technically SaaS. For that matter, so are Gmail, Google G Suite, Facebook, and myriad other programs you may use.
- Read the terms of service for software.
- Keep a “Technology” inventory and repair log to keep track of new hardware, software, upgrades, troubleshooting, and repairs.
- Consider hiring a certified tech professional to assist you in properly setting up, installing, and troubleshooting new hardware and software.
- Consider hiring a consultant or registering for classes/webinars/CLEs to learn how to use law office specific software. Consultants or software-specific classes are also helpful in training your staff.
- Develop a positive working relationship with a good IT support company for future troubleshooting issues.
- For links to many popular law office software products, go to www.scbare.org/pmap and click on technology.

- For free legal research, as a Bar member you are entitled to use Fastcase® legal research program. Just login to the Bar's website to access Fastcase®.
- Contact the South Carolina Bar Practice Management Assistance program for a free technology consultation. E-mail pmap@scbar.org.