Technology Decisions for the New Small Law Firm
South Carolina Bar Practice Management Assistance Program (PMAP)
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Budget: What's your technology budget? Every year you practice, include technology in your budget as an overhead expense. **Tip**: before purchasing anything, look online at www.scbar.org under member benefits for all available discounts.

Hardware:

o **Computer**. Choose a laptop or notebook computer or a desktop model. (There is little distinction between "laptop" and "notebook" except that often "notebooks" are classified as lighter.) Because your practice hinges on your computer and it will get heavy use, look online for "business" grade computers as opposed to home computers. While they typically cost more initially, there are advantages with business grade (more powerful, better components, more personalization of options). Look for major brands such as Dell, HP, Lenovo, Apple. (Mac users: Please see How to Choose a "Mac" Computer)

   • **Tip**: go to the manufacturer's website to "build" a computer to your own specs. Once you obtain a price online, you can try calling the sales number to see if a sales person can offer you a better deal than the online price or tell you about discounts not advertised online.

   • **Tip**: always add extended, on-site service with your purchase. You do not want to have to send your computer off to have it worked on.

   • **Tip**: for greater security, do not use your work computer for home/personal use.

   • **Tip**: If you purchase from a local independent computer store, make sure you compare what you get to what is online, especially with price, warranty, and service.

o **Laser Printer**. HP printers continue to be solid choices for the law office. Lease from a local office supplier or find an affordable printer that meets your needs. As with computers, you're looking for a "real" office printer. Inkjets are not a good option for a business.

o **Scanner**. If you plan to routinely scan paper documents and store them electronically, look for a good desktop scanner to scan directly to your computer in the right format. Fujitsu Scansnap and Epson currently make reliable small sheetfed scanners capable of scanning up to 50 or more pages at a time.

o **Copier**. Most lawyers find that leasing a copier that comes with service (some include paper and toner) from a local supplier is the most cost-effective solution.

o **Printer/scanner/copier**. An all-in-one may be sufficient for a solo just starting, but if you do, you still want laser, not inkjet, and the best option is always to invest in a business grade product.

o **Docking station/port replicator** or "dock." You can use a laptop and still have large monitors, an external keyboard, etc. with a dock. The external devices stay plugged into the dock waiting for you to plug in your laptop (effectively making it a "desktop" computer). It's best to purchase one when you purchase your laptop and other components for compatibility.

o **Uninterruptible power supply (UPS)**. Everything should be protected from power disruption, including your internet router. Lightning can cause significant damage to electronics (including the potential for permanent data loss on a hard drive). A mere power strip is insufficient protection. A UPS offers greater protection and can even be set up as a backup running on batteries if the power goes out.

o **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. (Experts recommend one on-site

backup of your entire computer, including programs, in addition to having at least two cloud backups for files.)

- **Tip**: Test your backups regularly by trying to retrieve a deleted "dummy" file from your backup.

o **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.

o **Faxing**. Although not used as frequently, and not a preferred method of transmission, some lawyers need to fax. You can accomplish this without buying a fax machine and separate phone line by using a scanner and an online fax service. The online service comes with a separate fax number. Look for one that offers a local area code if possible.

o **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.

o **Dictation**. If your typing skills lag, voice recognition software has come a long way. Dragon by Nuance is popular for dictating to your own software without the need of a third-party transcription service. For more traditional dictation, see Quikscribe or SpeakWrite.

- **Tip**: Check www.scbar.org for member discounts on products and services!
- **Tip:** Don't buy before you do some research. Read online reviews and find out how your hardware stacks up against the competition. There are many online websites like Pricegrabber.com, Monoprice.com and Google Shopping to compare tech prices. Even if you buy your hardware locally, you'll know whether the price is fair.

o **Networks.** Many, if not most, new small law offices today do not need a hardware network server. However, this can depend on several factors, including the software you need, and if you are in an area without high speed internet for backups or cloud computing.

Software:

o Security software. New computers come loaded with trial versions of security software, but research these carefully before you try them, as they may not be the best on the market. You may need to 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.

o Office suite. If you plan to use Word, plan on subscribing online to Microsoft Office 365. Look for Office 365 Business Premium, which includes the desktop applications of popular Office products, as well as email and calendaring. Your data is backed up to an included OneDrive file storage. If you can live without Word, G Suite from Google is another option for word processing, email, calendar, file storage, etc. Both services require a paid subscription.

- **Tip**: set up security settings before using 365 (look online for instructions) and read Google's terms of service as well.

o Case or practice management software. Most small offices choose cloud products designed for lawyers, such as Cosmolex, MyCase, Clio, Rocket Matter, Centerbase, etc. Find links online at https://tinyurl.com/y484pr5s. While most include time keeping and billing functionality, many require a separate subscription to Quickbooks for accounting. It makes sense to use a product that has its own integrated accounting.

- Practice-area software. If your practice focuses on one area of law, such as real estate, you may want to look for software to automate some processes.
  - **Tip**: read the terms of service for all software.
  - **Tip**: Find out what happens to the data stored online if you cancel and how you can save your data offline.
  - **Tip**: free software and apps are not recommended for use by lawyers. You actually "pay" by allowing the product access to your data and other personal information.
- Legal research. As a Bar member you are entitled to use Fastcase® legal research program – free. Just login to the Bar's website to access Fastcase®.

General Advice:
- When choosing an office, check internet options at your location and find out if your actual internet data speed is sufficient for your cloud programs, backups, phones, and more. If you share an office with anyone outside of your firm, don't share the internet.
- Check your cell phone coverage in the office. Some building materials are cell phone barriers, and nothing will change that.
- Register your own domain name and get web hosting through a service such as GoDaddy.
- Set up personal domain name email through MS 365, G Suite, or an Internet provider.
- Have at least a basic website with general office information if you have a domain name.
- Create your own website using WordPress templates or hire someone. For professional web design, prices vary widely – scrutinize all charges carefully. Research SEO claims especially – SEO is expensive, complicated, and not necessarily a guarantee.
- Remember that websites are advertising and consult all the ethics rules.
- Keep an inventory of hardware and software, including any repairs.
- Computers generally need to be replaced every three to five years, and software often requires maintenance agreements and updates, so be sure to budget annually.
- Hire a tech professional to assist you in properly implementing new hardware and software, and don't skip software training. Get recommendations from other lawyers.
- Try to get written proposals from at least three IT providers. Scrutinize all proposals carefully and ask questions about anything you don't understand.
- Install computer updates and patches promptly – updates often address critical security issues!
- For links to many popular law office software products, go to www.scbar.org/pmap and click on technology.
- Contact the SC Bar Practice Management Assistance Program (PMAP) for free assistance at pmap@scbar.org.