The Solo & Small Firm Committee Holds Its Second Annual Tech CLE

Technology is vital to running an efficient practice from your website to your case management software.

Here are 15 Technology Tips to Run Your Practice

BY ELIAS MONTOYA

1 *Internet domain* – Your internet domain is your identity to the world. Your domain should be easy to remember, short to type and contain in some form your firm's identification, such as the name of the firm.

2 *Website* – Your website is your initial marketing front. Not having one gives the impression that you are not an established business and does not inspire confidence.

3 *Email* – Your email system should also give an impression of professionalism and your email address should always be @ your internet domain.

4 *Security* – It is your responsibility to protect your system and your client's data, as such any well-designed computer network should always put security first. This means secured emails, smart firewall and updated antivirus/spyware active on all workstations and servers.

5 *Telecommunications* – When looking at a telephone system for your office, you should always consider a voice over IP (VoIP) system, which has many advantages over a conventional system. And when it comes to your office FAX, you should not be looking at anything but an electronic fax service that offers the ability to send/receive faxes via email.

6 *Computers* - When shopping for PCs, keep in mind what type of setup makes you most comfortable and productive and what specifications are required for the applications you will be using. Purchasing an inexpensive system will cost you frustrations and productivity in the long run.

7 *Printer/Copier/Scanner (Multi-Function)* – When choosing a printer always look into one with a network connected option that will allow you to share among different users. When choosing a scanner, make sure that it can scan directly to your server or online services.

8 *Server and/or Cloud storage and services* – Before making a decision, analyze the type of setup you would like to have and the requirements of the different applications and systems that you will be using. Always keep security and compliance in mind. Do not forget to discuss backups and business continuity before choosing any system!

9 *Productivity Software* – The essential tool of any law firm is their everyday productivity software. For most firms, this means Microsoft Office (Word, Excel, Outlook, PowerPoint, OneNote) and a good PDF annotation software, such as Adobe Acrobat. When choosing this software, keep in mind that not all versions will have the features you may need.

10 *Document Management System (DMS)* – Choose a system that is efficient and easy to categorize and search. Think about the long run when choosing, as migrating to a different system mid run will be a very disruptive and expensive venture.

11 *Case Management System (CMS)* – How you manage your cases is the cornerstone of the business side to any practice. As such, you should spend some time in researching and choosing a system that will give you the options of tracking and reporting on the details that are important to you.

12 *Specialized software and services* – If you will be specializing your practice in areas such as litigation, real estate or estate planning then keep in mind that other applications and services may be needed to run your practice.

13 *Training – Knowledge is key!* Investing in training for yourself and your team will pay for itself in the long run in efficiency and cost.

14 *Technology savvy employees* – Hiring technology savvy professionals is essential in running a productive practice. Non-technology savvy employees will not only cost you in productivity, but they will eventually become the weak point to your system's security and a potential liability to your practice.

15 *Technology Support Services* - You will need professional help in putting your systems together and maintaining them. Choose an IT Professional with law firm experience. Make sure that they have good references and are of the highest ethical standards, as they will have access to your sensitive data.

Elias Montoya is the President and Technology Director of eManTek. Mr. Montoya has been a professional in the law firm technology field for 20 years and previously worked as the in-house IT Director for 2 prominent South Florida law firms. At eManTek, he designs, develops and deploys software and hardware solutions for the legal environment. eManTek is an all-in-one IT consulting boutique specializing on technology implementation and support for small to mid-size law firms. ∎

Don't miss the next Solo Small Firm CLE, it's a half-day seminar designed to help you manage your practice on all fronts: business development, online presence, profitability and financial stability. It's the Hampton Inn, Brickell, March 29th at 12:00 noon and includes lunch and Happy Hour. Don't miss it...
Reserve your seat today 305-371-2220!