

Building a Technology Foundation for Successful Solo Practice

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David Whelan
Director, ABA Legal Technology Resource Center

Technology challenges the sole practitioner in a unique manner. As more lawyers and staff join a firm, the ability to distribute the requisite technology research and testing is greater. The sole practitioner is faced with this ongoing burden alone and yet it might be said that a solo can achieve results just as significant when the right technology is applied to a particular practice need.

The breadth of technology available is daunting. There are litigation support systems, online deposition tools, cyber deal rooms, wireless digital devices, and a slew of interesting software applications. Any of these tools may be able to enhance your ability to deliver legal services, improve your quality of life, or achieve some other professional goal. The focus should begin, however, with the foundation technology that will ensure you are building a solid technology infrastructure for your practice.

They break down into four foundation layers that will yield a powerful technology base on which to overlay your practice. These four layers will give you all of the tools you need to get started and a solid environment to which to add. They are your local area network (LAN), office suite, case management applications, and Internet tools.

Network: Connect Everything

The idea of a network for a sole practitioner may seem like technological overkill. Yet there is no law practice that cannot potentially benefit from this most basic resource. At its most simple, a network consists of at least two computers that are attached, via some communications method, typically wire, to each other and able to share

information and resources. One might ask, "If a network has two computers, why would a SOLO lawyer want one?" A network allows you to share the workload - and the many business tasks like data backup, or processes, like security - and relieves the burden on the computer on which you will be doing your professional work.

A network need not be complicated. In most cases, a "peer-to-peer" arrangement will work well. In a peer-to-peer network, you connect each computer directly to the other, and each computer can act as a server, or resource host, for the other. For example, if the documents you access are on your personal computer, you can copy them to the peer computer to enable data backup. If you have a printer connected to your computer, your staff can print documents to it without having their own printer. The same is true for a fax machine or any other resource that would be typically available on a network in a larger firm. The drawback, though, is that the other computer slows when it shares resources. As that print job comes in from your staff, your computer will devote its attention to both the printing document and the document you are editing, rather than giving you its full attention.

The better model is to install a client-server network - even if you are the only client! A client-server network is more like a wheel hub with spokes. The server sits at the center of the wheel and coordinates requests for resources, whether the request is to retrieve data or to print a document. If you use a laptop and disconnect from the network, the server remains in place and continues to perform all of its assigned tasks: backup, e-mail delivery, fax transmissions, anti-virus updates. More importantly, you can connect other devices - fax machines, printers, and the like - to the network without connecting them to a computer. The server manages their access to the network and

any requests that they receive.

It is worth saying a word about servers. Many computer companies build computers specifically called "servers" and these can be quite expensive, as they are exceptionally powerful. In most cases, a sole practitioner can use a slightly faster-than-average regular computer as a server without noticing any deficiencies. The important feature of this server is speed: make sure it has lots of Random Access Memory (RAM), large and fast hard disks, and as fast a processor (Intel Pentium, AMD Athlon, etc.) as you can afford. Also be sure to include a backup mechanism - tape drive, optical disk, or some other removal media. Place this computer in a locked room, out of the normal traffic of your office, and once it has been configured by you or your consultant, leave it alone unless you need to add or change functions. You should only physically access the server to change backup tapes. Everything else you need from the server should be accessible from your desktop.

Most computers sold today include a network interface card (NIC) because of the growth of home networking. This hardware connects your computer to your network. The typical speed of a wired network is 100 Megabytes per second (Mbps) which is fast enough to transmit even large documents and database information between computers. Be sure that when you purchase a computer, you purchase it with the NIC installed. If you already have your office computers, you will need to buy a NIC for each computer. You should not skimp on this item. Although you can purchase network cards for as low as \$20, some of these cards will cause anomalies in your computers. You are better off paying a bit more, typically in the \$30 to \$40 range for a desktop computer NIC, to get a good quality NIC. Even better, you can purchase from the same

company from which you bought your computers to ensure compatibility and quality assurance.

The only other piece of hardware you will need is a hub. In some cases, you will buy just the hub. In others, you will buy another piece of hardware, perhaps a modem or a device called a router, with a hub in it. The hub is where the other end of the wire that plugs into the NIC on the computer goes. Requests from the computer travel down the wire, to the hub, and then along wire to the resource destination: your server, printer, etc. If you have a DSL (digital subscriber line) modem with your hub, your requests may go straight out to the Internet. There are significant security issues if you have your network hub connected in any way to the Internet, as it can become a gateway both for you to access the Internet and others to access your network!

Once your computers are wired to your hub, your server is configured to handle data backups, to house your main software applications, and to perform automatic anti-virus updates, you are ready to add the second layer of the foundation.

Integrating Your Practice Tools: the Office Suite

We are not too far along from the days when the typewriter was a required element of any law firm. The advent of word processors and integrated office suites has made them less and less necessary and, in the office of a sole practitioner, you can dispense with them entirely. The key change in law firms is that, increasingly, lawyers are using more than just a word processor, whether it is Word or WordPerfect. Spreadsheets, databases, and presentations are now regular products of a lawyer's professional activities. It is vital that when you purchase software and begin to layout your technology foundation, that you purchase an integrated software suite and not just

the component parts. The time saved and efficiencies to be realized, when you can link a document to a spreadsheet or merge an address list from a contacts database, are enormous. If you own Corel WordPerfect, Lotus 1-2-3, and Microsoft PowerPoint, you have three vital tools - a word processor, a spreadsheet, and a presentation program - but instead of a powerful whole, the sum is less than the three parts. It is still true that the primary software application for most lawyers is the word processor. The integrated office suite allows you to continue to focus on your documents and research, but leveraging the power of the other tools in your office suite.

There are often debates about which program is better or more popular, but this is largely irrelevant for sole practitioners (and probably for everyone else). You should consider two issues when determining which office suite to purchase:

1. which one do you prefer and with which are you most comfortable.
2. with which one will your clients expect you to communicate with them.

If you are a business attorney, you will likely find that most of your clients use Microsoft products. If you are a committed WordPerfect maven, you will need to balance potential customer dissatisfaction against one of two options. First, ditching WordPerfect and being retrained on Word or alternatively, creating new procedures to ensure that your WordPerfect output arrives in a format they can use.

The retraining may seem drastic, although if you are not opposed to it, in the long run it might be the best choice. The alternative requires you to develop businesses processes to ensure compatibility between products but there are easy ways to accomplish this. You can use the document conversion programs provided by the vendors, converting files, as they are sent, into your client's preferred format or

converting them into yours when you receive them. On the other hand, you can use a third-party document product like Adobe Acrobat to create documents that, although not editable, will appear the same on any computer. Adobe Acrobat documents are particularly useful when your clients do not use the same computer systems - Windows vs. Macintosh, for example - as you do.

All of these choices will depend on your clients, their sophistication, and your own ability to work efficiently. Many lawyers stop once they have their office suite in place. They develop business processes for handling client data in a database and time and billing information in a spreadsheet, often failing even to integrate those systems. They never take the next step, which is to add the case management layer to their foundation and take advantage of the tools specifically designed for attorneys.

Managing Your Client Information and Work Product

The potential benefits of using case management software weighed against the cost of the software, training, and configuration are heavily in favor of the purchase. If a solo lawyer wants to wring out all the possible technological benefits she can for her practice, this should be a required tool. Not only do these packages pull together the primary tools that lawyers use - file, client, document, contact, and calendar management - they incorporate specialized functions like time and billing, accounts payable, "precedents" or fast track calendaring, and local court rules.

Sole practitioners are particularly well placed to benefit because most case management vendors have a special version especially for solos, generously priced, and yet containing all the tools available to a large firm. The added benefit to these systems, tested and improved over many years with lots of input from lawyers, is that

they integrate with your office suite. Your case management system can help you create a form document that will extract information from the appropriate client record in the database and generate the letter. The form is saved for future use, and the finished letter is stored in the client's electronic file. The next time you need to generate that letter, for a new client, your form is all ready to go.

Information in your case management system can be synchronized with your handheld computer (personal digital assistant (PDA), like a Palm Pilot or Pocket PC). Now you can take along a pocket version of your cases when you are away from the office and add changes to your main database when you return. Schedule a new hearing date while down at the courthouse on your PDA? It is calendared in your case management calendar when you synchronize upon returning to the office. You can also share calendars, and every other piece of information, in your system with your staff to eliminate double entry of any information or documents.

There are many additional features in case management systems that may seem extraneous. You can ignore those that you do not intend to use until, and if, you need them. Some case management systems include e-mail servers, legal research access links, and much more. The primary benefits you can get from case management software are in the basic building blocks it adds to your practice.

One of the most significant of these is document management. You are probably aware that there are specialized document assembly and document management programs available. They are not typically priced to encourage sole practitioners to purchase them and in some cases require additional purchases of server software or hardware in order to run the application. Most sole practitioners will be able to leverage

all the document assembly and management resources they need out of a standard case management package. Even if you use your case management software as nothing more than a document management, and assembly, tool, you will have eked out benefits that are so much more powerful than merely using a word processor.

Communications Tools: Internet, E-mail, the Web

The final layer encompasses your communications. What do you really need to get the most done? Most likely, you will be considering an Internet connection of some sort, most likely something fast like "broadband" connections using cable or digital subscriber lines (DSL). The most important thing is that you are considering some kind of Internet connection. The benefits of Internet use are incredible and the drawbacks are manageable. Many of the latter are not those that might immediately come to mind - hackers, security, viruses, spam e-mail - but rather include increased client expectations that you are accessible and the potentially distracting aspects of Web surfing.

There are a number of factors that will determine which Internet connection you use. Security is probably the most important factor that will not be determinative! If you are connecting up to the Internet, using a standard dial-up modem connection or using an "always on" DSL or cable connection, you need security. Attacks happen when you are online - it does not matter if you are not always online. Be sure that you purchase firewall software for every computer connecting to the Internet and allow only the minimum access to and from the Internet to allow you to accomplish research and communication.

If you have the choice between DSL and cable, the former is a better choice

because you are the only person on that line until it gets to your telecom company. A cable connection is a shared connection, and if you have shared folders and files on your computer, those may be accessible to others sharing your cable connection. DSL also offers a fixed rate of speed but cable will get slower as more users go online at any given time. Both technologies are "always on" and you will need to be vigilant about what traffic is coming in from the Internet as well as what is going out.

There are other choices for Internet connections - ISDN or T1 lines - but they are expensive and generally not worth the cost. DSL will typically be faster and cheaper than ISDN and the cost of the T1 connection outweighs any activity the average solo practitioner might have. If you have an office in a building with larger law firms, you might be able to lease part of their T1 connections to get just the connectivity you want without the extra expense. The dial-up option is still a reasonable one. If you primarily use the Internet only for e-mail or legal research, both tend to be low bandwidth technologies that are tolerable, and cheap, at low speeds. In some cases, this may be your only option if DSL or cable is not available.

You should have an e-mail account and should seriously consider purchasing a domain name identifying you and your practice. It is the difference between jdoe@aol.com and johndoe@doeandassociates.com. Although you can find free e-mail accounts, those are increasingly "you get what you pay for". There are free e-mail servers that you can install on your network server, but the easiest method is to purchase an e-mail account. In many cases it will come for free with your Internet access - AOL and most other Internet Service Providers (ISPs) offer at least one free e-mail account with Internet service. You can also have your domain name host, if you

choose to purchase a domain name, host your e-mail accounts. This provides you with the benefit of Web-based e-mail without the limits of the free accounts.

There are untold options when you are deciding on which e-mail application to use. You may have one included in software you have already purchased - Microsoft's Outlook or Outlook Express, e-mail in your case management program - but if you do not, your best route is one of the free programs available. There are benefits to using Microsoft's Outlook programs but the flip side is that you will be susceptible to nearly every hacker attack on e-mail, since Microsoft is the preferred target. Other programs include Qualcomm's free Eudora program and Pegasus Mail. You will find, however, that e-mail software is one of the most common applications available. Some of these, like Eudora, will also have a Palm version, allowing you to use the Eudora e-mail program and Web browser on your handheld computer.

Is That It?

This has only touched the surface. The technology available to the sole practitioner is staggering. These four layers only address the fundamental building blocks of your practice technology. There are practice-area software programs for real estate contracts and wills and trusts, litigation support software for trial preparation and courtroom presentation, and many others. Once your foundation is in place, you can start to investigate what other opportunities you might have to use technology to achieve your other professional goals.