

Setting Up a Law Office, Part One: The Latest in Legal Technology and Why You Need it Now!



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On/Off

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- ◆ Marquette Univ. Law School, 1986 (Law Review)
- ◆ Founded MicroLaw, Inc. in 1985
- ◆ Legal Technologist, Educator, Author
- ◆ Technolawyer Legal Technology Consultant of the Year 1999, Contributor of the Year 2001, 2002, 2005, 2006
- ◆ Founder/National Coordinator, HelpKatrinaLawyers.org (2005)
- ◆ Over 1400 law offices assisted across North America
- ◆ Frequent author and speaker nationwide on legal technology subjects
- ◆ Chair, Wisconsin Law & Technology Conference 2002-2006; Founder / Chair, Wisconsin Solo & Small Firm Conference 2007
- ◆ Founder / Co-Chair, National Solo & Small Firm Conference 2006
- ◆ Chair, Milwaukee Bar Association Technology Committee, 2002-2007
- ◆ Chair, ABA LPM Section Computer & Technology Division and Member, TECHSHOW 1997- 2001 Board, Co-Chair, LegalTech CLE Planning Board
- ◆ Author – “How Good Lawyers Survive Bad Times” (ABA LPM Publishing, 2009 – tinyurl.com/how-good-lawyers)



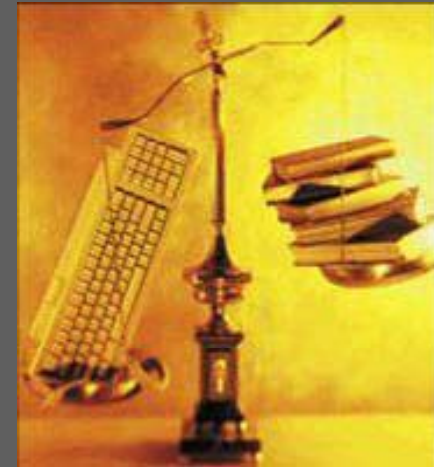
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In recognition of our gratitude for being able to serve the needs of legal clients for 25 years.. Contact Ross Kodner at MicroLaw, Inc. at 414-540-9433 or rkodner@microlaw.com to redeem. Expires 12/31/2010. For MicroLaw consulting services, legal technology training or support services exclusively.

A stylized, handwritten signature in black ink, appearing to read "Ross L. Kodner".

Ross L. Kodner, Esq.— President

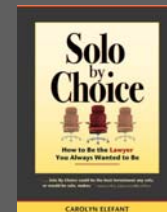
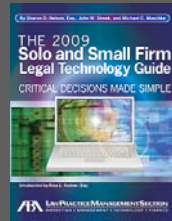
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Essential Books to Read First

- These are five critical books - indispensable guides for any small practice!
- “How to Start and Build a Law Practice” by Jay Foonberg
- “Flying Solo” - ABA Contributors
- “2010 Solo & Small Firm Legal Tech Guide” by Nelson, Simek & Maschke
- “How Good Lawyers Survive Bad Times” by Kodner, Nelson & Calloway (2009)
- “Solo by Choice” by Carolyn Elefant
- Visit www.abanet.org for ordering information



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Technology is NOT About Technology! Huh?

- Smart lawyers learn that technology isn't important other than as a means to ends that matter . . . what matters? **THE FIVE B's**
- **Best Practices** – how to use technology to maximize the quality of the legal services provided and raise your professionalism
- **Better Profitability** – how tech can increase your profit margins so you can make more without working harder
- **Battling Malpractice** – how tech can provide a malpractice safety net for your practice
- **Being Ethical** – how responsible use of tech can assure ethical compliance
- **Better Life** – how the right tech improves quality of life in law practice

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The Theoretical \$5000 Law Office: The Hardware

- Within reason, every law office system will have the following “parts and pieces”, all essential for the smooth and profitable functioning of a modern law practice:
- Hardware:
 - ▶ A computer - desktop or laptop
 - ▶ A printer - which may also be a FAX, copier and scanner
 - ▶ A backup system - to protect the \$5000 Law Office system's information
 - ▶ Electrical protection systems



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“Sweet Spot Desktop PC”

- Speed: 2.4 to 3.2 ghz Pentium Core 2 Duo or i5
- RAM: 3+ Gb or more
- Sound: for VR use a USB headset
- Monitors: 20-24” LCD flat panel (wide-mode preferred, pivoting to portrait mode ideal) – two better!
- CD-ROM: CD-Writer/DVD reader (but at least one PC with a DVD-writer, if not all of them)
- Hard Drive: 160-250 Gb SATA II if LAN station, 500-1000 GB if standalone system (10,000 rpm is best)
- Operating System: Windows 7 Pro (or XP Pro) (NO VISTA!)
- Network Card: 10/100/1000 wired
- Price: \$900-\$1500
- Brand: Whatever works for you! Generic PCs have no price advantage any longer



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“Sweet Spot Notebook PC”

- **Speed:** T8700 to T9600 Intel Core 2 Duo or i3/i5/i7
- **RAM:** 4+ GB (more RAM extends battery life!)
- **Sound:** You have little choice in this (use a USB headset for best voice recognition results! Look at Telex and Plantronics)
- **Monitors:** 14.1” - 15.4” wide-mode (careful with WUXGA - tiny characters! – also wide is good!)
- **CD-ROM:** DVD/Writer / CD-Writer
- **Hard Drive:** 250+ GB (up to 1 TB available; 7200 rpm is preferred!)
- **Network Card:** Built-in 10/100/1000 and 802.11g/n wireless
- **Weight/Size:** A personal decision
- **Price:** \$600-\$2300
- **Brand:** No Generics! First tier vendors like Toshiba, Lenovo (IBM), Dell, Compaq, HP



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“Sweet Spot Netbook”

- **Speed:** 1.6 ghz Intel Atom or similar processor
- **RAM:** 2+ Gb RAM
- **Monitors:** 10” – 12” – no smaller!
- **CD-ROM:** External – you can buy slimline DVD-burners for between \$35 and \$75 (eBay is a great source)
- **Hard Drive:** 160 -320 Gb
- **Network Card:** Built-in 10/100/1000 and 802.11g or n wireless
- **Weight/Size:** 2.5 to 3.5 lbs. is ideal
- **Price:** \$250 to \$650ish
- **Brand:** Asus 1000Hx, Lenovo Thinkpad X100e, Samsung NC10/20 are our favorites with the latter being slimmer/lighter but with slightly less battery life than the Acer. Newegg.com has been a great source



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What About Macs?

- **Macs make a lot of sense and should be considered**
- Since Macs can run Windows using Apple's BootCamp or Parallels, you can have the best of both worlds – the reliability of the Mac hardware, the elegance of Mac's OS X operating system and Windows with all your familiar programs
- **Comes down to a practical economic issue**
- You'll also need to check on local Mac system support



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“Sweet Spot”: Bundled Software

- **Software to Bundle:**
 - Microsoft Office - Ver. 2010 Small Business Edition best for most firms since it comes with PowerPoint
 - *Least costly way to acquire Microsoft Office is “bundled”*
 - *“Professional” adds Access and you likely don’t need it*
 - *“Basic” is just Word and Exce*
 - Look for bundling of Adobe Acrobat 9 Standard Edition - it's a necessity today and runs \$220 - \$275 if bought separately – then upgrade to Pro which adds Bates stamping
 - *Actual Acrobat is the best bet for creating PDFs because of its standardized security*
 - *Dell effectively includes it free when you get a Microsoft Office version on Latitude and Optiplex systems*
 - *Second Best – NitroPDF (www.nitropdf) - about \$99 per PC*
 - Corel WordPerfect X5 Suite
 - *Can be less costly to buy it separately in an OEM version on a 1:1 basis with any new PC systems*
 - Anti-Virus Software
 - *Resist the temptation since you probably already have Anti-Virus licenses or would want to use software identical to what you already have – for individual PCs, Microsoft's Security Essentials (free) is the best choice (free is good!)*

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“Sweet Spot”: Small Office Network Server (up to 10 Users)

- **CPU:** Single or Dual Intel Core 2 Duo or Quad Core XEON server processor
(larger onboard RAM cache is better – 2 or preferably 4 Mb)
- **RAM:** 4 Gb to 8 Gb (Look for faster 667 or 1066 MHz or the latest 1333 Mhz RAM)
- **Sound:** Irrelevant in a server - basic audio to hear operating system and software “cues”
- **Display:** Recycle an old monitor! Use a KVM (Keyboard/Video/Mouse)
switch to share one set among multiple servers.
- **Optical Drive:** A basic DVD reader is adequate
- **Hard Drive:** SAS (f/k/a SCSI) is rugged and intended for heavy-duty server use,
SATA is a distant second best (146 or 400 Gb, 10,000 or 15,000 RPM is better if well-cooled)
(RAID Level 5 Array or RAID Level 1 Mirrored/Duplexed pair of drives for better uptime).
- **Network Card(s):** Built-in 10/100/1000 (1000 = Gigabit Ethernet- capable)
or two of them - one for the internal network and one for the
Internet connection
- **Modem or Remote Management Card:** For emergency dial-in support
- **Power Supply:** A redundant power supply is good if available
- **OS:** Microsoft Windows 2008 Small Business Server is the best bet toda
- **Price:** \$1800-\$6000 without display
- **Brand:** Dell, HP, IBM are leaders - generics don't make much economic sense these days

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“Sweet Spot”: Shared Network Printers (up to 10 users)

- **Type:** Laser printer (black & white)
- **RAM:** 64 Mb preferred (more is better)
- **Speed:** At least 25 pages per minute (faster is better!) for shared use
- **Networking:** Internal or External 10/100 Ethernet print server (preferably
same brand as the printer for maximum compatibility, minimum support
headaches)
- **Paper Handling:** this is the MOST IMPORTANT factor - one paper tray
for each type of paper regularly printed on
 - Bond tray
 - Plain Paper tray
 - Envelope feeder (a must!)
 - Letterhead tray (if you still use pre-printed letterhead)
- **Brand:** HP or Lexmark only for primary “workhorse” printers
- **Model Suggestions:** HP Laserjet 4014/5 and 4510 series are proven workhorses
- **Price:** \$1000 - \$3500 plus additional needed paper trays (get an envelope feeder!)

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“Sweet Spot”: Small Multifunction Printers

- **Type:** Laser printer (black & white or color) is better than color inkjet for office use and much less costly to operate
- **RAM:** 64 Mb preferred (more is better)
- **Speed:** At least 20 pages per minute (faster is better!)
- **Networking:** If not shared, USB 2.0 connection is best. If shared, Internal or External 10/100/1000 Ethernet print server (preferably same brand as the printer for maximum compatibility, minimum support headaches)
- **Paper Handling:** Less flexibility than standard laser printers - but check to see if at least a second paper tray is available
- **Faxing:** Don't consider these PC fax units - they don't work well in that role; but they do work well as a substitute for a standalone fax machine
- **Scanning:** Want an automatic feeder and also look at included software to see if PaperPort, Acrobat and/or text recognition software is included
- **Copying:** Consider it a “backup” to your main copiers
 - Copiers as Multifunction Devices: may not be the best idea since your copier won't be available to make copies if someone is busy printing, faxing or scanning
- **Brand:** HP or Brother are safest choices
- **Model Suggestions:** HP Laserjet Color or Black/White MFDs generally a great choice
- **Price:** \$550-\$1500 (plus any optional extra paper trays)

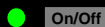
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“Sweet Spot”: Desktop Scanners

- **Type:** Compact desktop scanner for connection to a desktop PC
- **One-Sided Speed:** At least 15 pages per minute (faster is better!)
- **Duplexing:** Only buy double-sided scanning if you really need it
- **Paper Handling:** For most desktop situations, you are better served with an automatic document feeder that can handle at least 25 pages
- **Software Bundle:** Really important with a scanner - look for:
 - Adobe Acrobat for direct-to-PDF scanning
 - PaperPort for image management
 - OCR software for Text Recognition (OmniPage, TextBridge, or FineReader)
- **Brand:** Visioneer, Fujitsu and Xerox offer the best packages for legal desktop use
- **Model Suggestions:** Xerox Documate 252, Fujitsu ScanSnap S1500, Fujitsu ScanSnap S310
- **Price:** \$400-\$1000

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“Sweet Spot”: Handheld Wireless Devices

- **Types:** Blackberry, iPhone, Android (Google / Droid)
- **Differences:**
 - **Blackberry** syncs with Outlook and to check more than e-mail, you need the Blackberry Enterprise Server software and Exchange Server (the former is free for small firms, but complex to setup)
 - Real-time always on email
 - **iPhones** - syncs superbly with Outlook – most apps
 - **Android / Droid / Google** sync with Outlook and Google apps primarily, second most available apps
- **Popular Models:**
 - **Palm Smartphones:** the Pre – probably not the best choice
 - **Apple:** the 3GS and 4G iPhone
 - **Blackberry:** Depends on the wireless provider - look for Tour, Storm and Curve series
 - **Android:** Motorola Droid X, HTC Incredible
- **Pricing:** Anywhere from Free to \$400 depending on the cell service provider and available rebates



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“Sweet Spot”: Digital Camera

- **Type:** For most law office use, Point-and-Shoot models are quite adequate
- **Resolution:** At least 8 megapixels
- **Digital Film Type:** SD cards are the overwhelming standard today -and the least costly to purchase - get 2-4 Gb of high-speed capacity (under \$50); be sure to get an SD Digital Film reader for a PC in your office for easiest photo transfers (\$15-\$40)
- **Battery:** Lithium-ion rechargeable is good, but you want AA or AAA capability as well for emergencies
- **Docking:** “One Touch” docking units for simplifying photo transfer make sense, but SD card readers are easier to use
- **Brands:** Kodak, Nikon, Canon, Panasonic (Sony uses less standard Memory Sticks for digital film, Fujitsu and Olympus use odd WxD cards)
- **Price:** \$100-\$400

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Finding the “Right” Prices

- So how do you know you’re actually getting the best prices on the hardware and software components you decide to purchase?
- Good question! It’s a seemingly “mysterious” process involving incense, incantations, praying and hope
- Or . . . just plain common sense and a little clever web technology
- Leverage Web-based PC component pricing engines and save a fortune!



You're wasting \$\$\$ if you don't use these free services!

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Do Your Price Search!

1. Go to a Pricing site:



2. Enter your Search:



SEARCH FOR

3. Get the Hit and then click for more info:

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LaCie Hard Disk External 750GB Hard Drive
 (USB 2.0, 7,200 RPM, 16MB - MPN: 301303U)
 Price Range: **\$88.24 - \$156.30** from 13 Sellers

Description: The user-friendly LaCie Hard Drive, Design by Neil Poulton adds sophisticated style to your desktop yet its presence is quiet and unobtrusive. It has a unique distinguishing feature - a cool, blue LED strip on its underside that creates an [Read More](#)

Refurbished PDAs from AT&T
 Cut the cost, not the quality - Buy a refurbished PDA with the same functionality as new, but at a low price. [Get Yours Now.](#)

Compare Prices Product Details User Reviews Expert Reviews

New (13 Sellers from \$88.24)

Seller	Price (USD)	Tax	Shipping	BottomLinePrice	Availability	Seller Rating
Buy.com	\$88.24	No Tax	Free	Your Best Price \$88.24	In Stock	11421 Reviews
Newegg.com <small>Featured Merchant</small>	\$89.99	No Tax	Free	\$89.99	In Stock	21936 Reviews
PCNation <small>Free FedEx 2-3 Day</small>	\$100.40	No Tax	Free	\$100.40	In Stock	4023 Reviews
ElectronicsPLUS <small>Storefronts</small>	\$92.50	No Tax	\$11.75	\$104.25	In Stock	2836 Reviews
TechInWeb <small>Authorized Resale</small>	\$100.39	\$8.26	Free	\$108.67	In Stock	7247 Reviews
PC Connection						
AlwaysLowest.com						

Do Your Price Search!

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Maximize Membership Discounts!

- Your firm may be eligible for a number of “hidden” discounts on hardware and software systems
- Examples include membership benefits offered to members of various legal associations:
 - If your firm is also an ABA, ALA or other legal association member, you may be entitled to very significant software discounts
 - ABA members get “additional” discounts from companies like Dell, among others
- These discounts can often save money even after you’ve secured the “best price” on hardware and software
- Also, are there any rebates?



Your State Bar or other association membership may more than pay for itself if you leverage the member discounts available!

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Newer Tech: iPads and Tablet PCs

- The legal pad meets the laptop with tablets and the Apple iPad
- Is it a viable marriage?
- What does it do?
- It's a laptop and a virtual legal pad in one unit in the case of Windows units or a big iPod in the case of the iPad
- Handwriting recognition (sort of)
- Ability to annotate documents and fill in forms
- Works surprisingly well
- What it doesn't do
- Not enough battery life yet
- Still a little too big and bulky
- 3rd and 4th generation units now officially interesting – especially Lenovo's award-winning X series (\$1500-\$2700) or \$500 - \$900 for the iPad



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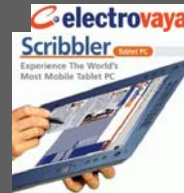
“Leading” Windows Tablet PC Systems



Toshiba Portege Tablet
(www.csd.toshiba.com)
(about \$1200 to \$1800)



ThinkPad
IBM/Lenovo X Series Tablet
(about \$1200 to \$2200)



Electrovaya's Scribbler
(about \$1600 to \$2600)

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Data Backup: The Most Boring Subject . . . That Will Save Your Practice One Day

- **Optional?:** No way!
- **Why?:** Because one day you will have a technology disaster and this will save your business!
- **Good:** Hard drives including USB/Firewire Portable and removable SATA for Disk to Disk (D2D) backup are preferred over all tape drives. SATA removeable drives are preferred over USB-connected drives.
- **Bad:** Any device that cannot do a full backup and restore onto a single piece of media (i.e. CD-RW, DVD, Zip, Jaz drives, Internet backup)
- **Really Bad:** Travan class backup devices--they simply don't work
- **Good Practices:**
 - At least 5 drives/tapes, alternating – more is better (consider a monthly 6th or 11th drive)
 - Replace the tapes after 2 years / drives last much longer
 - Full system backups only, automatically in the middle of the night
 - Regular “mini test restores”
 - Off-site storage of drives/tapes



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Read This Article on Backup! “Ross’ Great Truths About Data Backup”

- **Your practice may depend on it:** Read the article at this location:
<http://www.tinyurl.com/kodner-on-backup>
- **Primary Backup Software – Individual PC systems and Peer to Peer networks:** NTI Backup Now, Acronis TrueImage 2009
- **Primary Backup Software – Network Servers:** Symantec Backup Exec (standard or “Small Business”) – ver. 12 with the right mix of “agents” and the “Disaster Recovery” module



ONLINE BACKUP AS A SECONDARY METHOD ONLY!

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Fighting the Invisible Enemy: Electrical Protection Systems

- **Optional?: Again, no way!**
- **Why?:** Because every law firm experiences “unseen” electrical disturbances: surges and voltage drops
- **Good:** Most surge protectors over \$15 are “safe” - consider low-cost UPS (uninterruptible power supplies) from companies like APC and Tripplite to protect your PC
- **Bad:** Any surge protector below \$15 - especially the \$5 variety of “power strips” typically offer no real protection
- **Really Bad:** Using nothing at all and hoping for the best
- **Good Practices:**
 - Every device that plugs into any outlet needs protection
 - This includes modem lines and network cables
 - Leave no opening for a voltage surge to enter and damage your system
 - Seriously consider a UPS for your PC



UPS models start at \$35

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Other PC System Parts and Pieces

- **Monitors:**
 - 22" LCD at a minimum
 - 19", 22", 24" or even larger is better and wide-mode is even better (40% more screen space than a 17" display — look for 600:1 or higher contrast ratios)
 - 19-20-22" LCD panels - from \$99 to \$250
 - Take up little desk space and have no glare
 - Look at “pivoting” displays for full page views
 - Dual monitor capability too is HUGELY USEFUL! (requires dual output video adapter or a device like the Matrox DualHead2Go or TripleHead2Go)
- **Internet Router/Firewall:**
 - You need either a software firewall or a hardware firewall to keep the bad guys out – consider UTM (Unified Threat Management systems)
 - Heavy-duty hardware firewall, wireless and Internet router in one low-cost device is from Netgear for under \$150 to well over \$1000 for Cisco branded products
- **Good Ergonomics: You need to be physically comfortable to be productive**
 - Consider a combination telephone and PC headset with a “Quick Release” feature (from HelloDirect.com or Plantronics.com)
 - Consider monitor risers, foot rests, keyboard drawers and similar accessories as well as non-glare lighting, a supportive chair, an ergonomic keyboard and the right desk height (see www.CyberGuys.com)



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Scanning and the Paper LESS Office™

- The Paper LESS Office™ is a simple concept that helps you tame the paper monster in your office
- Following a “scan everything” approach that turns physical paper into electronic paper, every case-related document can be at your fingertips with a few mouse clicks - really, it works
- Full info is at www.MicroLaw.com/cle/plessindex.html
- For low-cost scanning, Fujitsu's ScanSnap S1500 and the 50 ppm Xerox Documate 262, (\$400ish, \$1200ish respectively)



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The \$5000 Law Office: The Software

- Software is the fuel that drives your \$5000 law office system. You should have the following applications to run your practice:
- Software:
 - Both office suites and Adobe Acrobat or other PDF Writer
 - Billing/accounting software
 - A Case management system
 - A document management system
 - E-mail software and a web browser(s)
 - Internet access for research
 - Data backup, security and anti- virus software

The Right Software is the Ultimate Lawyer's Toolbox



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Windows 7, XP or Vista?



Windows XP Pro is still okay, but there's no reason not to use Windows 7 today



Windows 7 ROCKS! Very stable, fast, reliable – the Pro 32 or 64 versions are the right choice today.



Windows Vista presents frustration that will make you suicidal (dump it and move to Windows 7)

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The Office Suite Wars are Over: Becoming WPA is More Important

- WordPerfect is a better legal word processor than word . . . but so?
- Smart lawyers learn both Word 2010 and WordPerfect X5 and use both in the right situations
- Electronically Smart lawyers use Adobe Acrobat 9 to create universally readable PDF files and send them as attachments by default
- This is the heart of the WPA concept - becoming Word Processing Ambidextrous meaning format compatibility with everyone



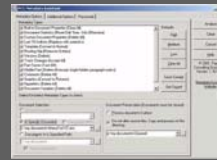
BEWARE ONLINE WORD PROCESSING!

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CRITICAL ALERT!! Metadata: What You Can't See CAN Hurt You!

- Most frightening tech issue perhaps *EVER!*
- Word, Excel and Powerpoint store all changes, edits, deletions permanent “under the hood” of your files
- Any recipient of the electronic file can look at it!
- **At best:** embarrassing
- **At worst:** malpractice!
- Fixes:
 - Don't send out Word files
 - Send only PDF or RTF files
 - Use Payne's Metadata Assistant or Workshare Protect (www.payneconsulting.com - \$89)



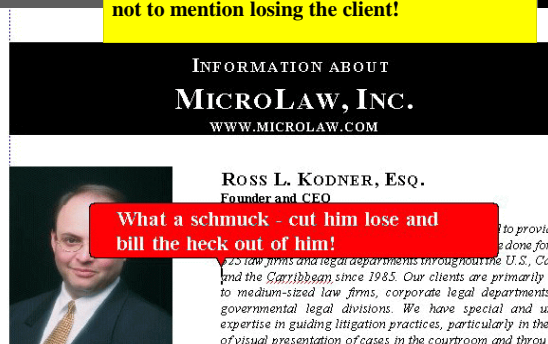
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Metadata: Insidious, Terrifying and Microsoft's Fault!

1. Your document, with a deleted “comment box”, in the file that you e- mail to your client

2. Your client looking at your “deleted” Metadata - the damaging “Comment Box” is resurrected - you'll be lucky if you get paid, not to mention losing the client!



What a schmuck - cut him lose and bill the heck out of him!

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Billing & Accounting Systems: The Financial Heart of Every Law Practice

- You don't bill, you don't eat - very simple equation!
- TABS 3, Timeslips, PCLaw and Quickbooks dominate the small firm market for legal billing/accounting software
- TABS, BillingMatters (until end of 2010 only!) PCLaw and Timeslips integrate accounting functions with billing capabilities. Timesolv is a SaaS product.
- Timeslips doesn't - a big strike against it
- Look at the program that produces statements and reports in a format that makes sense to you and your clients and also for local support



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Case Management Systems: Don't Practice Law Without One!

- The beating "info heart" of your law practice - every practice, all sizes
- Combines calendaring/docketing and tickler functions with case information tracking, address book functionality, conflict of interest searching, document assembly capabilities all with Palm and laptop portability
- Reasons:
 - Turn wasted time looking for case info and documents into billable time
 - Avoid malpractice
 - Better than 6 different programs to do similar things
- Look at Amicus Attorney, TimeMatters, PracticeMaster, PCLaw and ProLaw, or online with Clio or Rocketmatter



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Practicing in the Cloud

- ◆ **SaaS = Software as a Service** = A web-based system. Leading examples of web-based case managers include Clio, RocketMatter, VLO Tech and Houdini, Esq. / billing options include TimeSolv, and data backup, word processing (Google Docs), online calendars abound (Google / Yahoo calendars)
- ◆ Care must be taken in selecting this option because there are several concerns to review:

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Cloud Realities

- ◆ SaaS Concerns are:
 - **Ethics**: Is it ethically permissible to give control of active client information to a third party?
 - **Practical Continuity**: What happens if you lose internet connectivity – how do you work if your entire case management system is online?
 - **Permanent Continuity**: What happens to all your data if the SaaS provider goes out of business? How do you get access to your data in some sort of usable form?
- ◆ SaaS Case Management systems should not be automatically discounted as an idea, but the practical reality is that you need to VERY carefully consider the concerns raised – with that said, I'm now comfortable with this option, particularly with the Clio offering which I'm now recommending to clients (www.goclio.com)

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Web-Based Pluses / Minuses

◆ SaaS practice management systems have pluses and minuses v. “terrestrial” systems:

- **Pluses:** Always up-to-date, always backed up, lower startup costs, simpler (generally) interfaces
- **Minuses:** What happens if you lose internet connectivity – how do you work if your entire case management system is online? You pay monthly, forever so more costly over the long haul, fewer features especially in billing/bookkeeping and document assembly
- **Bottom-Line:** These services have come of age and have proven themselves – for smaller or virtual practices, they merit serious consideration, especially the two leaders: Clio and RocketMatter.

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Web-Based Case Mgmt Options

- ◆ Clio is a leading Canadian-produced web case manager

www.goclio.com



Clio includes practice management with time and billing functionality.

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The screenshot displays the RocketMatter web application. At the top left is the RocketMatter logo with the tagline 'The web generation of legal software'. The main interface features a search bar with the text 'enter name or matter' and a 'GO' button. Below the search bar are two main sections: 'Upcoming Calendar Events' and 'Pending To-Do's'. The 'Upcoming Calendar Events' section contains a table with columns for 'Event', 'Date', 'Year', and 'End'. The 'Pending To-Do's' section lists several tasks, each with a checkbox and a due date.

Web-Based Case Mgmt Options

◆ RocketMatter
www.rocketmatter.com

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Document Management Systems: Finding Digital Needles in Your Electronic Haystack

- Adjunct to case management is document management:
- The ability to organize your documents like a file cabinet
- Search for your prior work product much as you would do a Lexis or Westlaw or Google search
- Avoid constantly re-inventing the wheel because it's easier to re-create than find prior "gems" amidst your mass of documents
- Worldox GX2 is the leader in small firm document management (www.worldox.com)
- I consider it a "must have"



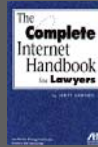
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Legal Research: What to Do?

- First, part of the answer to this perennial question is:
 - **Get it online!**
 - **Dump the CD-ROMs and as many books as you can**
- Next, there is no single “best” legal research service
- A combination of CaseMaker, Fastcase, Lexis, Westlaw, and the Internet’s resource can work best
- **Look at the best small firm packages negotiated by your State Bar or County Bar - and then regularly revisit your contract to always have the most current and least cost arrangement**
- Read LLRX.com and Jerry Lawson’s “The Complete Internet Handbook for Lawyers”



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“Little Systems” But “Big Capability”

- They’re not “Big Applications” but they are the digital glue that holds your system together
- **E-mail:** Outlook 2010, Mozilla Thunderbird, Gmail (Outlook is essential for most of us because of its tight integration with case and document management systems)
- **Anti-Virus software:** sadly essential
- Critical to keep it updated daily! Microsoft’s Security Essentials is free for individual PCs and a top choice now!
- **Data backup software:** a backup system is worthless without it – online is NOT enough by itself!
- **Software firewall:** keeps the bad guys out of your computer system - and they **ARE** trying to get in!
- **PC FAX:** protects your computer from malicious software by letting you go back in time before the mess! PC FAX - just do it with eFAX, MyFax, RapidFax or Maxemail.com

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Data Backup Software Systems

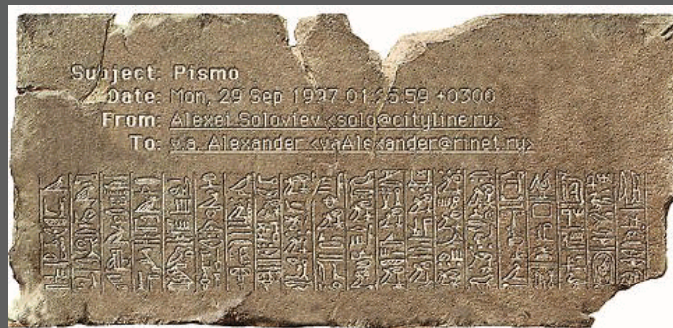
- You can have the fanciest tape backup drive on the planet but without capable backup software, it won't protect you at all!
- I like the following software to backup a single PC:
- NTI BackupNow
(www.ntibackupnow.com)
- Acronis True Image
(www.acronis.com)



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The First Legal E-Mail Message



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E-Mail - Can't Practice Law Without It

- Can't practice law today without e-mail
- Many programs available
- *Microsoft Outlook*: www.microsoft.com/outlook
- *Thunderbird* (www.mozilla.org)
- *Gmail for webmail (no other)*: www.gmail.com



- **Key tips:**
- *Learn to filter messages into multiple mailboxes*
- *Avoid listserve overload*
- *Use vacation autoresponders cautiously*
- *Use anti-virus software that is e-mail aware*
- *Mind your Netiquette*
- *No one takes an AOL/Yahoo/MSN/Hotmail e-mail address seriously - get your own domain and use it*

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Anti-Virus & a Time Machine!



- Trend Micro Internet Security Suite 2010
- www.trendmicro.com
- Includes anti-virus, anti-spam, anti-spyware
- Available in small office and "Corporate" editions

THE NEW CONTENDER: Microsoft Security Essentials – it's free and terrific! (microsoft.com/security_essentials/)

- Avoid Norton/Symantec and McAfee like the plague!
- Learn how and when to use the Windows 7 System Restore!

Microsoft®
Security Essentials

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More Than One PC? Connect 'Em!

- If you have more than one PC, they need to be networked, period
- Share printers, centralize data and docs, backup centrally - makes sense
- Build a server-based network with Microsoft Windows 2008 Small Business Server
- Or . . . build a Windows peer-to-peer system with a “quasi” server or a centralized network storage drive such as the SnapServer (less desirable than a “real” server)
- Go wired with Category 5e/6 cable or wireless (or a combination of both)



Snap Server 1100

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Wireless Networking at Home or in the Office

- It's amazing - it works! The most common type is now the faster 802.11g/n - many laptops come with it already
- 802.11n is the system to buy!!
- **Wireless Access Point - \$10 to \$750**
- **Wireless PC Access - \$5 to \$100**
- **Wireless Print Servers - \$50 to \$300**



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Voice Recognition: Ready for Prime Time? You Bet!

- Yes . . . and no
- **YES** if you “play by the rules”
- **Powerful PC hardware**
- **USB headset**
- **Patience in “training” the software and correcting its mistakes so it learns**
- No if you’re not willing to “play by the rules”
- **Dragon NaturallySpeaking 11 Premium and from Nuance is the top product**
- Look at USB headset microphones from Plantronics and Telex Audio

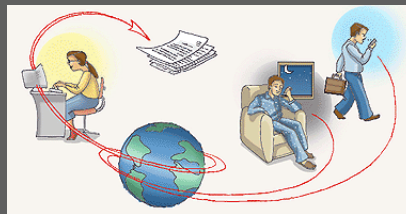


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Dictation is Roaring Back – Digitally, That is!

- Digital dictation makes a LOT of sense even if you’ve never dictated before
- **Portable dictation with handhels from Olympus, Philips and Grundig – look for units with “slide switches” for best one-handed operation (don’t skimp on the handheld, otherwise you won’t use it!)**
- **Dragon NaturallySpeaking 10 Preferred and Professional from Nuance can transcribe and recognize your voice, producing a Word document**
- Look at Winscribe systems too – even dictate via your iPhone or Blackberry



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The \$5000 SSF System (One Possibility):

- **Sweet Spot PC:** \$900-\$1500ish
- **Printer:** i.e. HP MFC laser-based - \$500
- **Backup:** Set of 5 x 750 Gb removable hard drives, carrier and Acronis TrueImage software - \$500-\$750
- **Docs:** WordPerfect X5Suite Upgrade - \$130 or MS Office 2010 Small Business Upgrade – Under \$300 if bundled), Acrobat 9 (bundled)
- **Billing & Accounting:** TABS 3, Quickbooks Pro - \$525
- **Electrical Protection:** APC SurgeArrest Pro - \$25
- **Case Manager:** PracticeMaster - \$295
- **Document Manager:** Worldox - \$475 (CRITICAL!)
- **Legal Research:** Lexis or Westlaw Small Firm Package or CaseMaker
- **Set Up and Training:** Approximately \$1500-\$2500 for competent planning, setup and training
- **If You Lease it All:** Expect about \$160-\$250 per month for 36 months, FMV or 10% buyout

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Representing Yourself “Pro Se” on Your Technology Project?

- Abraham Lincoln would have said you have a fool for a client!
- Assess your ability to correctly design, implement and train on your new system
- Setup right = fast return on investment and the system becomes a money machine
- Setup wrong = and the system is like a hole in the office floor into which you pour otherwise billable hours (read this article on the cost of do-it-yourself, *pro se* legal technology efforts: <http://rossipsa.com/?p=39>)
- Find a reputable, experienced legal technology consultant
 - Ask other firms who they've used and who to avoid
 - CHECK REFERENCES!
 - *You don't want to be a rookie's guinea pig!*

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Learning to Use Your System: Nothing is More Important

You Can Buy the Fanciest, Most Expensive, Most Cutting Edge Hardware and Software and Still Have Unproductive, Mind-Numbing, Time-Sapping Chaos



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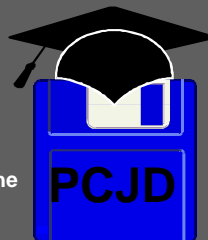
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Training Where? In-House v. Off-Site Training

In-House

- Uses your own PCs and your own data
- Possible interruptions
- Can be done over the Web with WebEx



Out-of-House

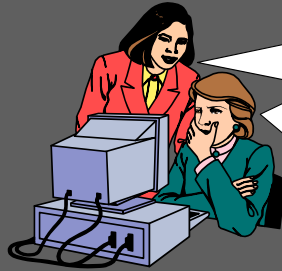
- Often too "generic"
- Away from the office interruptions

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Avoid “Cookie Cutter” Legal Technology Training



Well I know it doesn't look EXACTLY like your firm's new system, but on p. 31 of my training guide, it said this was what a firm like yours needed

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Managing Your Key Resource: Knowledge!



Sally connected her new USB BrainDrain Cap to pour all her knowledge into the firm's computer systems

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Leveraging the Web in Your Practice: Extranets!



Connect to clients, courts, co-counsel, securely via the Web using Extranet and secure web documents technology

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So Don't Worry if You're a "TechnoPeasant": There's Hope!



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A Little Training and Behold: Super Legal Geek!



Official legal pocket protector



Don't forget
the proper
geek
fashions!

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Paying for Technology: *The Big Five:*

- 1) Purchasing Using “Your Cash”
- 2) *Purchasing Using “Your Credit”
(Financing via your Credit Line)*
- 3) Purchasing Using “Someone
Else’s Cash” (A Loan)
- 4) *“Smart” Leasing*
- 5) Hybrid Lease/Purchase
Approaches

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Paying for Upgrades: Leasing as a Financing Tool

- We're all utterly frustrated by short product life cycles and agonizing fast product obsolescence
- The way you acquire new hardware and software upgrades may be a way to combat this - using a clever combination of leases and purchases
- Forget about "traditional leasing" - for example, those ads on the backs of *PC Magazine* touting "only \$90/month" for leases for on the perfect Dell or Gateway PC configuration are "sucker leases" - high interest leases that are cash/profit cows for these companies
- Most banks are equally clueless about technology leasing - they all seem to offer \$1 buyout "leases" which if audited, would likely be re-classified by the IRS as "installment purchases" and you would be penalized, not to mention having to re-do it on your books as a capitalized/depreciated fixed asset purchase

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Finding the Right Technology Lessor

- Use leasing companies who specialize in technology and equipment leasing
- The difference comes mostly from their experience in lease-end disposal of systems
- They have connections to brokers who buy the turned-in components at the end of leases who in turn sell them to third world countries
- Because the lessor makes money at the end in sales to brokers, there is less need to make lots of money on the initial lease
- The net result is a combination of a higher buyout amount offered (as much as 10-15% "fair market value" buyouts are not unusual) which translates to lower payments during the lease term
- The "more than nominal" buyout amount may properly act as a barrier to purchasing lease-end components
- This is a GOOD THING since after the lease term (if the term matched the product's obsolescence period) you DON'T WANT THE PRODUCTS - why? BECAUSE THEY'RE OBSOLETE!!
- The key is looking at the mix of hardware and software products you are acquiring and structure a "layered" acquisition . . .

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Think “Layered” . . .

- This means using a combination of a lease with varying terms for various “classes” of products and selective purchases
- Certain PC products obsolete to the point of being much less productive in predictable time periods
 - For example, about 3 years for desktop PC stations and servers
 - About 2 years MAX for laptops
- However, other PC products have much longer life cycles
- Network infrastructure items like hubs, routers, racking systems, UPSes, and laser printers can last many more years
- So you can do a lease which has a 3 year term on “3 year products”, a 2 year term on “2 year products” and a 5-7 year term on those products that seem to last forever before needing replacement
- And software--do you ever really get rid of software? No, you keep it updated, but you keep it--this means it often makes more sense to purchase it
- So what’s the end result of this “layered” approach?

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The Layered Leasing Approach

- For your quickly obsoleting PC workstation, server and laptop components, it ends up being much like a car lease - you drive it for the lease term, turn it back in and get a fresh “car” that you lease all over again
- This “use it, turn it in, lease a new one” approach gives a predictable monthly “use” cost (fully deductible as an expense on the books) and gives reasonable insurance that you’re never using products that are long past their useful life cycle - which means they would be boat anchors on your productivity
- Another interesting option is to buy-out the PCs and laptops at the end of the lease term and pass them through at buy-out cost to employees - a nice employee benefit and no cost to the firm . . .
- Done properly, you end up with financial resource maximization - paying only for what you use, always using the “right” components with a staggered replacement scheme that always happens in a finite, predictable, budgetable period of time
- With lease interest rates often less than borrowed money today (with the right lessor), this approaches “no brainer” status!

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Thank You!



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