



CREATE A TECHNOLOGY PLAN FOR YOUR PRACTICE

BY GINA BONGIOVI, ESQ.

Modern technology is allowing more and more people to work remotely. As lawyers, we are no different. It is certainly possible, and in most cases advisable, to bring your practice management into this century and dispense with the antiquated vestiges of our profession. Ironically, it is also possible and almost probable for technology to compromise productivity and, frankly, get in the way.

Careful consideration of available technology and how it helps or hurts a firm is a crucial component of any strategic plan. Technology can help a smaller business level the playing field by maximizing efficiency and lowering overhead costs. The legal profession, specifically, is undergoing a sea-change, and client service is more important than ever. Firms with astronomical billing rates and slow-as-molasses response times are losing clients to firms that are agile, responsive and efficient. How can a law firm, large or small, become more intentional about the implementation and use of technology? It is important to consider the technology both from a firm's internal perspective and from that of its current and prospective clients. Fundamentally, the goal is to identify your firm's processes and align them with technology.

The first step in creating a technology plan is to gather the information on which you will base your analysis. Remember, garbage in/garbage out: so these initial efforts, as menial as they may seem, are integral to the process.

Tracking Tasks

There are a number of ways to collect this information, but the simplest is to keep a notepad on your desk and write down every single task you complete in a given week. Ensure that each member of your team does the same. When the tasks are compiled, draw four columns, sorting the tasks into those that are immediately revenue-generating and those that are not; the tasks you enjoy and those you dread, where your accuracy and proficiency likely suffer. The tasks that are not immediately revenue-generating or enjoyable are the ones to delegate, ideally to technology or to another person.

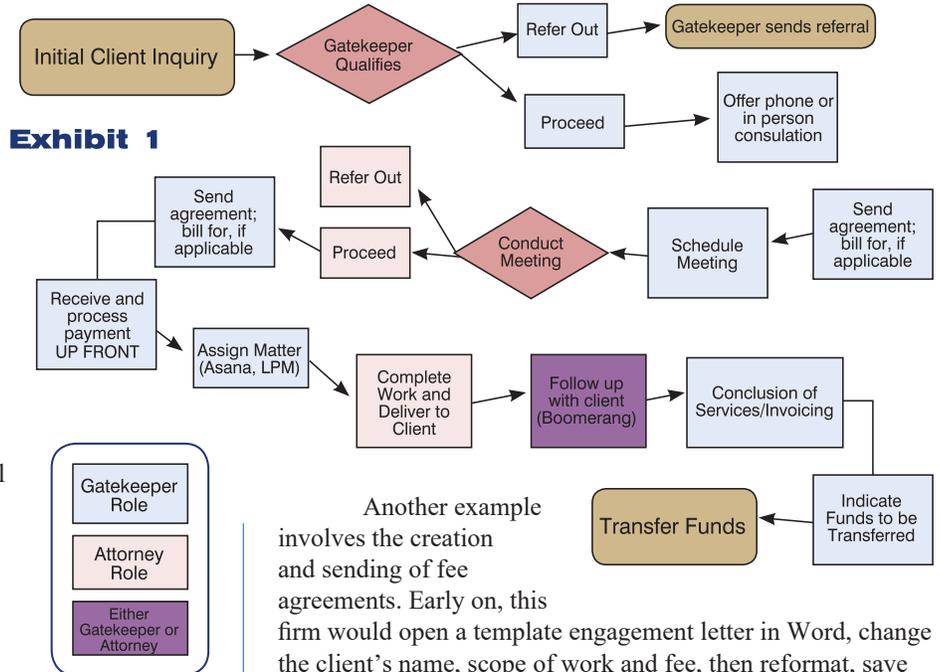
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Process Mapping

You'll next organize this long list of tasks into a process map. Start by describing each process within the firm (in a narrative, flow chart, table, etc.), and ensure each task is accounted for in a process. Involve the entire team, as staff members have different perspectives and may offer deeper insights into the smaller steps in each process. Exhibit 1 is an example of a process map displaying a small, transactional firm's flat-fee client process.

In engaging in this exercise at a small firm, the firm's administrative assistant pointed out that, after opening a client file, she enters the client information into Google Contacts, QuickBooks and Constant Contact. This duplication could be consolidated with a holistic CRM system, or by identifying services that will communicate with one another to sync information, such as Zapier. QuickBooks, for example, will sync with Outlook contacts, but historically has not played well on MacOS.



Another example involves the creation and sending of fee agreements. Early on, this firm would open a template engagement letter in Word, change the client's name, scope of work and fee, then reformat, save to a PDF and send to the client. This process took about ten increasingly frustrating minutes. By converting the process to Echosign (now Adobe Sign), it was reduced to about ten seconds, and all agreements are tracked and managed online.

Assemble Current Technology Picture

In a separate list, identify all the technology your firm uses, the purposes each serves, its cost and its expected expiration date. This list should include your CRM, case management system, accounting software, marketing services, hardware, SaaS solutions, etc.

Once you have a clear picture of the technology in use, identify any duplication in purpose and determine if the duplication is necessary. As an example, one law firm stores documents in the cloud with three different providers: Dropbox, Box and Google Drive. It keeps its forms bank in Dropbox, but stores its more sensitive client files in Box, because Box offers a higher level of security (and Dropbox has been breached more than once). Its least-sensitive documents, or those that require real-time collaboration, are kept in Google Drive. Why maintain all three? This firm has found that many people are comfortable with Dropbox and like to share information with the firm using that platform. Client convenience may be enough justification to continue use of Dropbox, but it is important to analyze the costs involved in maintaining all three and the benefits the firm or its clients derive from the variety.

Next, examine each item on the list and determine whether it is still working for you. Do you need to update it or replace it altogether? Nothing in a firm is a sacred cow – just because something has been in use for years does not mean it cannot or should not change. If you have a piece of hardware on which you spent a lot of money, but that is gathering dust on your desk, consider getting rid of it or upgrading to the newest model.

Technology	Purpose(s)	Cost	Expected Exp Date
Laptops	Create mobility among the team	\$1,500-\$1,800 ea	2020
Scanner	Paperless office	\$600	2019
Printer (all-in-one)	Printing Envelope printing/certified mail Flatbed scanning Flatbed faxing	\$400	2019
LabelMaker	Avoid post office Mailing label printing Stamp printing	\$250	2019
Online fax	Save money on fax line Maintain paperless office Fax PDFs from anywhere (mobility)	\$9.95/mo	N/A
G Suite	Email management Domain management Calendar Contacts	\$300/yr	N/A
Asana	Task management Collaboration Client contacts	Free	N/A
Constant Contact	Marketing	\$35/mo	N/A
Quickbooks Online	Accounting Invoicing Trust account tracking Client contacts	\$80/mo	N/A
Social Media	Marketing	Free	
Dropbox	Cloud storage		
Box	Cloud storage of more sensitive files		
Google Drive	Cloud storage Word processing Presentations Tracking client payments		
Office 365	Word processing Presentations		

SWOT Analysis

Yet-another beneficial information-gathering process is to complete your firm’s Strength, Weakness, Opportunity and Threat (SWOT) analysis and determine if technology can help maximize strengths and opportunities, while minimizing weaknesses and threats.

A SWOT analysis is a common planning tool used by organizations to identify internal and external influences, and where those influences place the organization in the marketplace. Strengths and weaknesses are viewed from an internal perspective; what characteristics of the business give it an advantage over others (intellectual property, location, etc.)? Opportunities and threats are external factors (suppliers, competitors, etc.). Here again, it is best to have all members of the team participate, as the gatekeeper may have better insight into why someone calls your firm over another, or why someone might become dissatisfied with your services and seek help elsewhere.

For strengths, ask: what does your company do well? What internal resources do you have? What advantages do you have over your competition? What makes your company different or unique? Strengths are within your control.

For weaknesses, ask questions like: what is stopping you from creating a competitive advantage in a particular area? What does your business lack that you see each day? Do clients voice similar complaints over and over again?

Opportunities are characteristics of the marketplace that, if taken advantage of, can lead to success. Do you have a good reputation among other attorneys and potential clients? Has the industry recently seen changes that help your company?

Threats are factors over which you have no control, but could place your company at risk. Identify elements such as your current competitors, any regulations that might impede your current operations and commoditization of the service you offer.

INTERNAL	
STRENGTHS	WEAKNESSES
<ul style="list-style-type: none"> • Response time • Specialization • Accepting credit cards where competitors do not • Location 	<ul style="list-style-type: none"> • Duplication of information • Spending too much money on needless technology • [process] takes too much time • Lack of staff
EXTERNAL	
OPPORTUNITIES	THREATS
<ul style="list-style-type: none"> • Positioning firm as expert in new regulations (recreational marijuana) • Flat fee in market with hourly billing • Economic recovery 	<ul style="list-style-type: none"> • Bar discipline • DIY law (LegalZoom) • Competitors are offering flat fee billing

Examine each of the boxes in the matrix and see where you can improve through technology. If you counted “accepting credit cards” as one of your strengths because most other firms do not, don’t stop there. Make it easier for clients to pay via credit card by ensuring they can click through an invoice to enter their information. If “bar discipline” is listed as a threat, minimize it by using technology that is bar-endorsed.

Technology Plan Example

Exhibit 2

With your process maps, current technology picture and SWOT analysis, identify any bottlenecks, duplication or other pain points and log them into a technology plan (Exhibit 2). Identify in detail what you need to resolve each pain point and, first, determine which of these can be resolved through use of technology. Be sure to be very specific about the “need” parameters. That way, as you are researching options, you can quickly and easily vet the options by comparing them to your needs list, ignoring those that do not align.

Have a plan for how you will test-drive each tool: who will participate, how you will track success and how much time you will devote to each test. This is a delicate balance. Allow enough time to truly get a feel for whether the tool will resolve your pain points, without

Pain Point	Need (with specifics)	Possible Solutions	Analysis (Positive and Negative)	Measurable Results	Keep or Replace?
Duplication of contact date entry	Integrated CRM that syncs with G Suite and Quickbooks	SalesForce InfusionSoft	Doesn't integrate with current technology Expensive		
Fee agreements take too long to process	Platform to keep fee agreements, minimize times, and facilitate e-signatures	Adobe Sign			
Credit card processing is clunky	Platform that integrates merchant processor into invoicing, at low processing rates	Clio + LawPay Quickbooks + QB merchant	Processing rates too high compared with non-integrated services		
Task management is buried in emails	Collaboration platform that enables all users to update	Asana LPM			
Trust account tracking is cumbersome	LPM platform that talks to Quickbooks and makes entering of client payments and invoicing foolproof	ZolaSuite Clio			

sacrificing time that could be spent exploring other options. Try to plan free trials to end on weekends. You will spend the first part of the trial just figuring out how to use the

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Consolidation of Pain Points

WE KNOW HOW TO MAKE AN IMPACT

**THEY MAKE THE
IMPACT POSSIBLE**

**PARTICIPATING
FINANCIAL INSTITUTIONS**

- American First National Bank
- Bank of America
- Bank of George
- Bank of Nevada
- Bank of the West
- BMO Harris Bank
- Citibank
- City National Bank
- East West Bank
- Financial Horizons Credit Union
- First Foundation Bank
- First Independent Bank of Nevada
- First Savings Bank
- First Security Bank of Nevada
- Heritage Bank
- JPMorgan Chase & Co.
- Kirkwood Bank of Nevada
- Meadows Bank
- Mutual of Omaha
- Nevada Bank & Trust
- Nevada State Bank
- Northern Trust Bank
- Plaza Bank
- Plumas Bank
- Royal Business Bank
- Silver State Schools Credit Union
- Town and Country Bank
- Umpqua Bank
- US Bank
- Valley Bank of Nevada (BNLV)
- Washington Federal
- Wells Fargo

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software, so having a weekend on the tail end to devote to really exploring all its features will help you make an informed decision. Take advantage of demos offered by many solutions. Similarly, try to schedule the demos for the middle or end of the free trials, so that you can pose the questions you have accrued to an expert.

As a technology tool passes muster, add it to your plan, and list its benefits and downsides. Technology is always and quickly changing, so having a quick-reference matrix will help you adapt.

As with any business-planning process, crafting a technology plan for your firm will take time, energy and thought. However, the outcome will ultimately save time and money, enhance client service and help your firm compete in a quickly evolving marketplace. **NL**



GINA BONGIOVI has dedicated her practice to serving startups and small businesses. With a B.S.B.A. in marketing from UNLV, she is well suited to giving her clients business-minded legal advice addressing all facets of business ownership. Bongiovi has helped found several well-known nonprofits and currently serves as pro bono counsel for the Vegas Shepherd Rescue and Working K9 Rescue. She is also a frequent speaker at the American Bar Association Techshow, which takes place in Chicago in March.