

TIME FOR A TECH AUDIT?

by Jeffrey S. Krause, Esq.

Performing a technology audit is a proactive way to keep on top of your technology.

When was the last time you inventoried and reviewed the efficiency of your office technology? Do you have a technology plan and budget in place? If technology is a frustrating issue for you or if keeping up with advancements has not been a top priority, then maybe it's time for a technology audit.

For many law offices, the answers to these questions are "never" and "no." It is a common mistake. After all, when your technology is working, you don't really pay much attention to it. The problem is that all technology has a life expectancy, and the closer you get to the end of a particular product's life, the more likely you are to experience an unexpected catastrophic failure. Replacing your technology after such a failure usually is much more time-consuming and frustrating than replacing technology on a budgeted cycle.

So, how does one go about performing a tech audit? The first steps are actually quite easy. Make a list of all of your workstations, servers, printers, fax machines, mobile devices, scanners, etc. Next, visit each one of these devices and write down the specifications (manufacturer, model number, etc.). For some devices, this is pretty easy. For others, like servers and workstations, you will need to look a little deeper as there are quite a few technical specifications. For example: how much RAM is there? What is the CPU speed? What is the size of the hard drive and how much space is available? There is also a lot of information to gather related to the software and applications you are using on both your server(s) and your workstations. Make sure you make note of versions and patch levels for all of your software. Finally, check your records. When were these devices purchased? For most computer equipment, the expected useful life is somewhere between three and four years. Are you running any critical systems on borrowed time? If your server is three years old, do you have a plan in place to replace it within the next year? Is the warranty still in effect? What about an emergency plan if it stops tomorrow? Yikes!

If you are feeling overwhelmed at the prospect of a software inventory, there are free and almost free tools that can help. One such free tool is Belarc Advisor (<http://belarc.com>). Belarc Advisor creates a profile of your computer including, installed software, status of your Microsoft hot fixes, and anti-virus status. Belarc's commercial products do the same for your full network as well as monitor security threats and other management level items.

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About the Author

Jeffrey S. Krause is a Wisconsin attorney and is the owner and founder of Krause Practice Management, LLC, a consultation firm that provides technology advice and service to law firms of all sizes, with a focus on the efficient use of technology in the law office.

Mr. Krause is a Certified Independent Consultant (CIC) for the popular Time Matters Business and Practice Management software as well as Billing Matters, HotDocs and PCLaw. He has worked with Time Matters through its last nine versions and has assisted hundreds of law firms during his ten years as a CIC. He assists law firms with many other popular products including TABS3, Worldox, digital dictation and scanning solutions.

Mr. Krause is a frequent author and speaker on legal technology subjects. His Practice Management Blog (<http://blog.krausepm.com>) covers subjects ranging from law firm marketing to product tips and tricks.



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Several items are easy to take for granted and overlook during this process. One such item is backup. Backup is boring and not very glamorous as technology goes, but it is the type of thing that will save your practice. Is your backup working? When was the last time you tested it? What type of methodology (rotation, full or incremental) are you using? It is crucial that these questions are answered, or crucial data and hours of labor could potentially be lost. Another easily overlooked item is security. How secure is your data? If you have remote access you have at least some security risk. What security do you have in place? Your firewall and anti-virus must be capable of meeting the growing threats on the internet.

The second phase of a tech audit is a little more difficult to do without help. In this phase, you have to ask yourself some difficult questions. Are you using your technology in the best way possible? Is your staff properly trained on the technology they are supposed to be using? Is your workflow built around your technology or are they completely independent of one another? What technologies have you heard of or read about that are worth investigating? This can be difficult because you might not be familiar with better ways of doing things. How can you know whether a document management system would help you if you are not familiar with the concept?

The difficulty of analyzing things you don't know much about and then trying to plan a strategy around those things is where a consultant can help. There are consultants who can assist your firm with everything from Office 2007 training to choosing the right smart phone. Some of them charge for everything while others offer free initial consultations and recommendations. Most, like my team Krause Practice Management, offer both. If you do some of the legwork and provide us with information on what software and hardware you have, KPM will provide recommendations for improvement at no charge. For a fee, we will review your technology, interview your staff, analyze your workflow and other processes, and compile a report with specific recommendations for everything from new software to a training plan and a roadmap for the next two years.

Now that you have gathered all of this information, or worked with a consultant to find out where you are currently, how do you use this information? Here are some suggestions. One purpose of a tech audit is to determine the status of your current technology and make appropriate updates and upgrades. This could mean new software or hardware which should probably be your first priority. A second purpose is to determine where you can improve your use of technology. These might be addressed by new hardware or software or a training investment in the software you already have. Finally, a technology audit should address where you are going. If you have identified the need for replacing critical technology, and you are not doing it immediately, you need to put a plan (and a budget) in place to make it happen to better your firm's work environment. A technology road map is critical for keeping your firm performing at the height of its potential.

Performing a technology audit is a proactive way to keep on top of your technology and you should consider doing one or having one done once a year. An audit will help identify potential issues that may become serious problems for your business if left unattended. They also help provide future direction so that your technology decisions become less haphazard and more the result of careful planning. While they cannot foresee or eliminate every possible problem, they can go a long way toward making things more predictable and allowing you time to work on what matters—your business.

About Krause Practice Management, LLC

Krause Practice Management was founded in June, 2007 by Jeffrey S. Krause. KPM provides technology consultation services to law firms and other professional offices of all sizes. They focus on implementing case management, billing and accounting, document management, and document assembly systems.

No firm is too large or too small to work with Krause Practice Management. Jeff Krause has worked with hundreds of firms ranging from solo practitioners to firms with over 100 attorneys.

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