

Managing Growth:

What You Should Know Before Adding Staff, Attorneys, Equipment, and Technology

Technology Planning for Growing Law Firms

General Considerations

Scaling Up

In many ways, the technology required for a growing law office is the same as that needed for a solo or small office. A larger office still needs to create documents, read and answer email, save documents, bill clients and manage the practice. The software tools required to do all of these things change only slightly as the firm grows. However, the hardware necessary to run all of these tools must keep up with an increased number of attorneys and staff.

Scaling up Your Network and Peripheral Hardware

As your office grows, some of your computer hardware has to grow with it. This is particularly true of peripheral hardware like printers, scanners, and network switches. You will also find that you need a true network to improve access to your documents and data.

Servers

A solo or small firm lawyer can certainly get by without a server. However, as the firm grows, the need for a true server will increase. Once your office grows beyond two or three computers, you will start to feel this need. By the time your office reaches five computers, a server is practically essential. Some of the benefits of a server include:

- Faster and more robust file and print sharing
- More efficient centralized file saving location
- Eliminates many of the headaches associated with Vista
- Network operating system to control security
- Network email management
- Better backup options
- Databases run better in a server environment
- Additional remote access options

Even an entry level server (\$2500-\$3500) can accomplish all of these tasks. Having a server often means that you can automate many things that you have to do manually on your workstation (e.g. backup, database indexing).

Entry Level Server Specs

The following server will run a small law office.

PowerEdge SC440	Dual Core Intel® Pentium®E2180, 2.0GHz, 1MB Cache, 800MHz FSB
Operating System	Microsoft® Small Business Server 2003 R2 with SP2, Standard Edition (with 5 licenses)
Memory	4GB DDR2, 667MHz, 4X1GB Dual Ranked DIMMs
Primary Hard Drive	500GB 7.2K RPM Serial ATA 3Gbps 3.5-in Cabled Hard Drive, Primary
2nd Hard Drive	500GB 7.2K RPM Serial ATA 3Gbps 3.5-in Cabled Hard Drive, Additional
Hard Drive Controller	SAS 5IR internal RAID adapter, PCI-Express
Network Adapter	On-Board Single Gigabit Network Adapter
CD/DVD Drive	48X IDE CD-RW/DVD ROM Drive
Tape Backup Software	Symantec Backup Exec v12 Small Business Server Suite
Hard Drive Configuration	Add-in SAS5iR (SATA/SAS Controller) supports 2 Hard Drives - RAID 1
Hardware Support Services	3 Year ProSupport for End Users and NBD On-site Service
Backup Unit	RD100 Ext USB Drive with 1 160GB/320GB Cartridge

*As configured, the price for this server at Dell on August 27, 2008, is \$2,378.00. You will probably want additional backup cartridges and may need more Microsoft network licenses. The labor necessary for a qualified technician to configure this server, join all of your existing workstations to your network, and move your old data to the new server is typically 15 hours, give or take a few hours.

Workhorse Printer

Law offices generate paper and, the larger the office, the more paper it generates. Changing paper and manually feeding envelopes waste time and becomes a bigger hassle as more users seek to print to the same printer. While it is certainly possible to use a small and inexpensive laser printer in a small office, a growing office needs a printer capable of faster printing, holding more paper and holding different types of paper.

What should you look for in a workhorse printer?

- High paper capacity

- Additional paper trays, also with high paper capacity
- High page per minute printing
- Automatic envelope feeder
- Built in network adapter

Examples of printers with the range of specifications:

HP 4015x (\$1,699.00 without envelope feeder)

Kyocera FS-4000DN (\$1550.00 without envelope feeder)

Workhorse Scanner

Law offices also attract paper and, the larger the office, the more paper it attracts. Depending on the size of your office and the amount of incoming paper, a more powerful scanner may be necessary to move the paper faster. If this is the case, look for scanner that can scan more pages per minute and has a higher automatic document feeder capacity.

An example of such a scanner is the Fujitsu fi-6130 Sheet-Fed Scanner. The dimensions of this scanner are only 12 x 6 x 6 but it processes paper at 40 pages per minute and holds 50 pages in the automatic document feeder. The cost is around \$950. If you need a flatbed scanner, consider the fi-6230 model has the same specifications and costs around \$1250.

Scaling Up Software and Processes

Become Your Own Post Office

With a server and a static IP address, your law firm can become its own email post office. There are a number of good reasons to do this. Here are just a few:

- Internal email never leaves the office
- Grant others in the office access to your mailbox, contact list or calendar
- Set your own size limits for mailbox size

Remote Access Solutions

Solo practitioners and very small firms can use GoToMyPC or some other remote login solution. However, as more people need to access the system remotely, a more robust system is required. Today, most of these solutions are known as thin client.

A thin client solution allows multiple remote users to login to a specific server and control it as if it were a desktop. All of the applications the remote user needs are installed on the server and can be run remotely. What do you need for this solution? You need a computer to log into, software to control the remote users and a static IP address for the users to connect to. Popular thin client solutions are Microsoft Terminal Server and Citrix.

Keeping Everyone on the Same Page

Your systems for managing your case files and saving documents may work just fine as long as you are the only attorney in the office. Adding more attorneys very often means you are adding

varying methods for doing the same thing. Using multiple systems to do the same thing is both inefficient and dangerous. It causes staff to learn each system and might lead to other problems. For example, imagine two different systems for conflict checking. It is twice as much work to create, maintain and search the two systems and it is difficult to keep them both accurate.

Practice Management

As your firm grows, managing client and matter data becomes more difficult. Even if you were able to get by without a practice management system in the beginning, you will find that you need one as your firm grows. Here are some signs that you need a practice management system:

- Partners are finding it difficult to coordinate their schedules with Associates or the other Partners
- Contact information for clients or others is being misplaced or needs to be shared with others in the office
- Simple things like phone numbers, statute dates, or case notes require extensive searching around the office
- Documents are difficult to find because they are being saved in a disorganized fashion

Document Management

Documents are the primary work product of law offices and new documents are often created from or based on prior work product. Unless they want to reinvent the wheel every time, law firms need to be able to locate and retrieve previously generated documents. As your firm grows, it is not uncommon for each new attorney to bring a different method for saving and naming documents. This makes it increasingly difficult to locate critical documents.

A document management system can enforce a naming convention and save location, ensuring that critical documents are saved in the right place for backup and security. A document management system automatically indexes new documents through the use of a profile and text. All of this makes documents easier to find and leads to fewer lost documents.

How do you know when you need a document management system? Ask yourself how much time you spend searching for documents in your office.

Growing Without Growing

Can your firm “grow” without increasing the number of attorneys or staff? What if technology could help do more work in the same amount of time? In some cases, it can.

Creating Efficiencies with Technology: Document Automation

Most attorneys draft documents from scratch or by painstakingly copying and pasting sections of existing documents. This process takes a long time and can lead to embarrassing omissions or missed deletions. Document automation is the process of creating documents from

optimized templates. Creating a document is as simple as filling in the blanks. When used properly, document automation allows you to generate documents in much less time. In some cases, the time to create a document can be as little ten percent of the time necessary to draft a document the old fashioned way.

HotDocs is the leading program in this market. HotDocs templates rely on an interview in which HotDocs asks the document assembler a series of questions. The final document is created based on these answers.

Document automation can be expensive. However, if you can do four or five times the number of estate plans or LLC operating agreements in the same amount of time, document automation pays for itself very quickly.

Outsourcing Technology

As your firm grows, will you have time to be your own IT department? Sooner or later, your firm is going to be too large, have too many computers or become too complicated for you to do everything. When you reach this point, hire an expert. An expert can configure your computer system faster and better than you can. Yes, it will cost you but you have to consider the time you are wasting fixing computers instead of billing. Do what you are best at and allow an expert to do the same.