



# Hanging Out a Shingle: Technology Every Solo Needs

Presented by:  
Nicholas B. Proy

# Biography

- Solo attorney
- Network administrator for 12+ years
- Practice law in Maryland, Pennsylvania and Washington, D.C.
- Practice areas:
  - Civil litigation
  - Estate planning and administration
  - Intellectual property
  - Small business law

# Topics Covered

- Communications
- Practice Management
- Computer/Network Security
- Office Machines
- Internet Presence

# Communications: Phone Systems

- Phone systems are the lifeblood of the solo's office
- Voice Over IP (VoIP) vs. Plain Old Telephone Service (POTS)
- Reception provided through virtual office
  - No right to keep telephone number when you leave

# Communications: Phone Systems



- Vonage
  - \$29/month (+ \$9.99/month fax line)
  - Voicemails are e-mailed in WAV and text formats:

**Vonage Visual Voicemail from [REDACTED] - New Voicemail Received**

[REDACTED]@vm.vonage.com

Sent: Wed 5/11/2011 5:02 PM

To: nick@proylaw.com

 Message  voice-message.wav (132 KB)

Date : May 11 2011 05:01:13 PM

From : [REDACTED]

To : Nick Proy Law Firm, LLC (14433528517)

"Hi Nick, it's Kerry returning your call from earlier. I just wanted to let you know that the papers are ready for your signature. If you could give me a call back we'll be good to go. I'll talk to you later. Thanks. Bye"

# Communications: Phone Systems

- Besides Vonage:
  - 8x8
  - Lingo
  - Magic Jack
  - Ooma

# Communications: Phone Systems

- Google Voice
  - Free service that provides a telephone number for your Google account that forwards to another phone
    - Ex: My Google Voice number (202) 656-PROY forwards to my office and cell
  - Allows you to schedule call forwarding
- Be leery about publishing your cell phone number
  - You will regret it at 6:00AM on a Saturday morning
  - Pass out your Google voice number instead

# Communications:

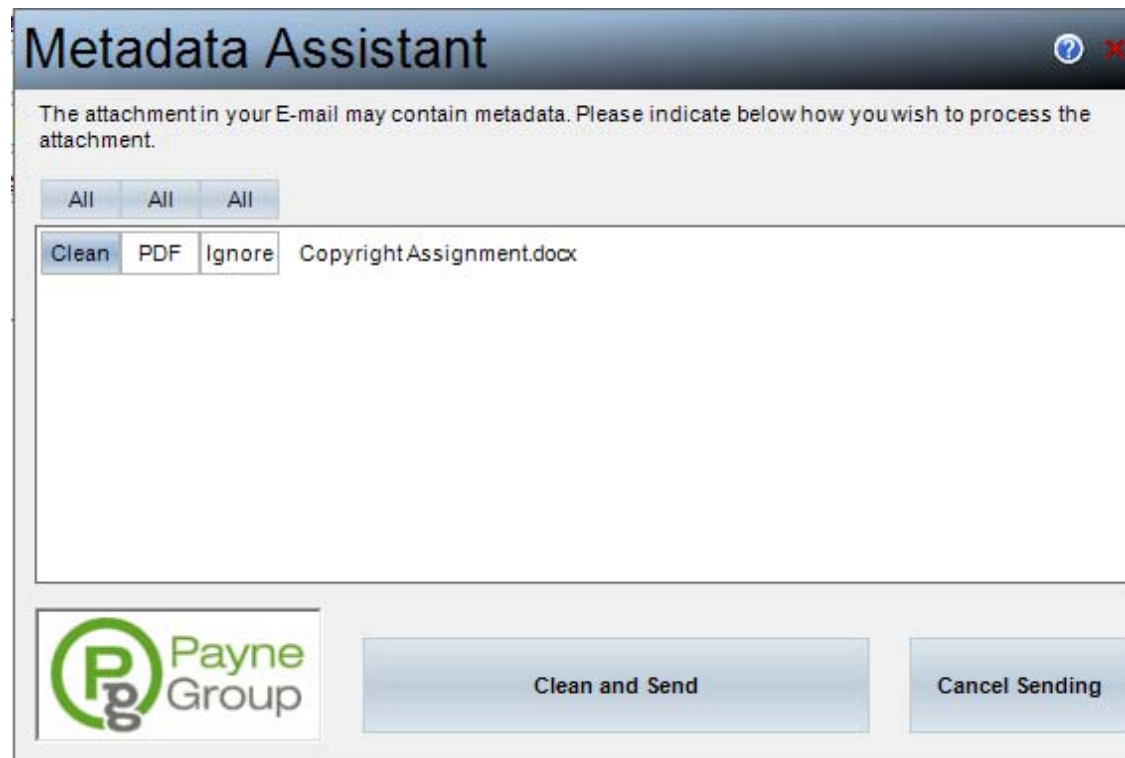
## E-Mail

- Keep e-mail addresses professional
  - No gmail.com, hotmail.com or comcast.net
  - Use your domain name (talk to your web hosting provider)
    - Ex: nick@proylaw.com



# Communications: E-Mail and Metadata

- Metadata Assistant
  - Maryland is in the minority for allowing metadata searches



# Communications: Facsimile

- Fax is not dead!
- Look for an all-in-one unit to avoid purchasing a separate machine
  - Printer, Copier, Scanner, Fax
  - Ex: Brother MFC-7840W
- E-Fax is available
  - Cost is roughly the same as a separate fax line
  - No control over the fax number

# Practice Management: Office Suites

- You will need an office suite
  - Microsoft Office
    - Microsoft Word is gaining popularity among younger attorneys
  - Open Office
    - Compatible with Microsoft Office and free
  - Corel Office
    - Word Perfect is less favored by younger attorneys

# Practice Management: Accounting

- You will need some accounting software to keep track of IOLTA and operating accounts
  - QuickBooks
  - Quicken
  - GnuCash (free)
  - Peachtree Accounting
- This software does not replace your accountant!

# Practice Management: Lawyer-Specific Programs

- Types of Lawyer-Specific Programs
  - Timekeeping
  - Conflicts Checking
  - Calendaring/Tickler Systems
    - Tickler systems are nagging reminders to make sure you stay on schedule
- Malpractice insurance carriers may give discounts for implementing these systems

# Practice Management: Lawyer-Specific Programs

- Law Practice Management Software
  - These software suites bundle together almost everything you will need to run a law practice
- Most Common:
  - Abacus Law
  - Amicus Attorney
  - Clio
  - PCLaw
  - Time Matters
  - And many more!!

# Practice Management: Legal Research

- You know about LexisNexis and West Law, but there are alternatives for the budget-conscious (ie: new solos):
  - **Google Scholar**
    - Free
    - Cases from all 50 states + federal courts
  - **Michie's**
    - Free
    - Up-to-date Maryland Code and Rules
  - **FastCase**
    - Benefit of being an MSBA member
    - All Maryland cases and statutes

# Practice Management: Backup

- Whatever you do, backup your data!
- Cloud solutions
  - Ex: Carbonite or Egnyte
- Local solutions
  - Local server that has backup software
  - USB hard drives

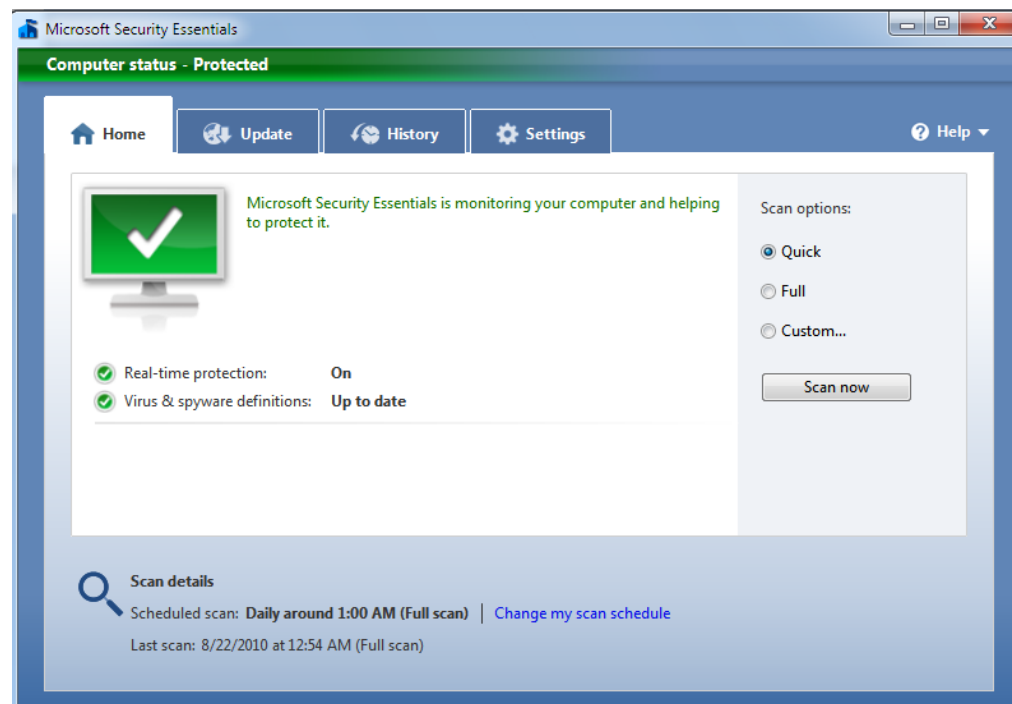


# Computer/Network Security: Virus Scanners

- You need a virus scanner
  - Yes, even if you have a Mac
- You need to keep your virus scanner updated
- You need not pay for a virus scanner
  - There are many free virus scanners that perform better than Norton or McAfee

# Computer/Network Security: Virus Scanners

- Microsoft Security Essentials
  - A free virus scanner from Microsoft
  - Keeps itself up to date and no recurring charges



# Computer/Network Security: Malware Scanners

- “Malware” is anything other than a virus
  - Ex: Spyware, Adware, etc...
- You should have a malware scanner in addition to a virus scanner

# Computer/Network Security: Malware Scanners

- I recommend Malwarebytes
  - Reasonably priced (from free to \$19.95)
  - Non-expiring license
  - Automatically updates itself
  - Prevents you from visiting infected websites



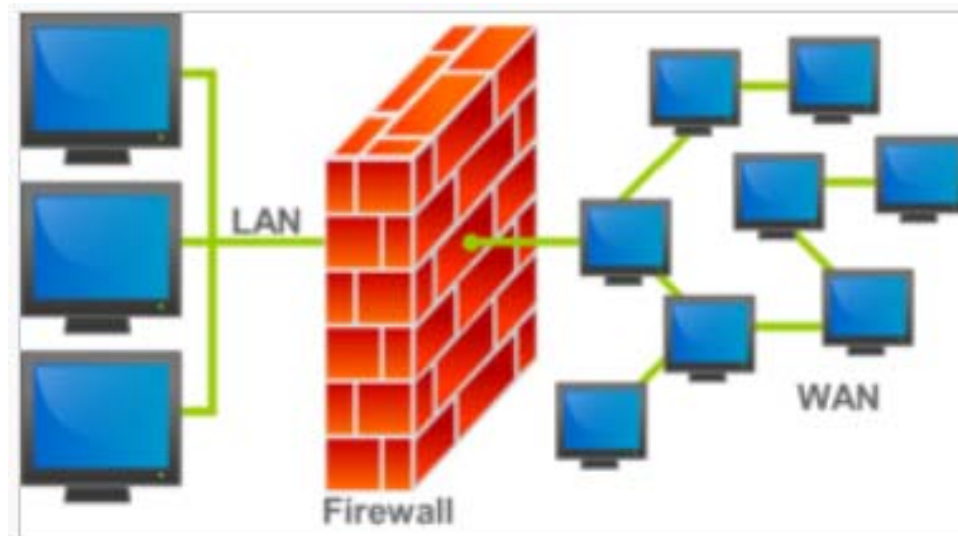
Malwarebytes' Anti-Malware



Successfully blocked access to a potentially malicious  
website: 64.74.223.42

# Computer/Network Security: Firewalls

- Firewalls protect your computer/network from outside threats
- You may need professional help installing and configuring a firewall



# Office Machines: Printers, Copiers, Scanners and Fax

- All-in-one units work well for those just starting out
  - Lower cost than individual machines
  - Do not use any inkjet devices
    - Laser units are cheaper to operate and produce better printouts
- Biggest Disadvantage:
  - If the machine fails, you no longer have a printer, copier, scanner or fax
    - This is a major problem!

# Office Machines: Computers

- Desktop or Laptop?
  - Laptops are more expensive and more likely to be stolen
    - You will need to encrypt the hard drive
  - Desktops are useless if you are mostly out of your office
  - Desktops are cheaper than laptops for the same performance

# Office Machines: Computers

- *Mac v. PC* (Yes, I went there)
  - Macs are becoming more popular in law offices, but PCs are still dominant
  - Not all practice management suites run on a Mac
  - Macs are more expensive to repair and more expensive upfront
  - Macs are still susceptible to viruses, but less susceptible than PCs



# Office Machines: Network Equipment

- Do you want wireless internet (WiFi)?
  - If so, you will need a WiFi access point or router
- Do you want a hardware or software firewall?
  - There are advantages and disadvantages to each
- Does your VoIP service require a specific setup?

# Office Machines: Postage

- You may want to consider getting a postage scale to weigh outgoing mail
- Postage meters have recurring monthly rental fees in addition to postage used
- The Dymo Label Writer allows you to print your own postage without recurring fees
  - They have many models available

# Office Machines: Business Card Scanner

- How do you keep track of all of your business cards?
  - CardScan
    - It scans business cards to a database
    - Not necessary, but nice to have



# Internet Presence: Your Website

- You need a website
  - Even if it is simple
  - Many times your contact information is misplaced and people turn to the Internet
  - Do not display ads on your website
- You can get new clients through Internet searches
  - You will need to use search engine optimization (SEO) techniques

# Internet Presence: Your Website - SEO

- SEO allows you to optimize your website for certain words for search engines
  - Ex: “Baltimore Estate Planning Lawyer”
- The theory is that if you optimize your website properly, it will rank higher in the search results
  - And if it ranks higher, you can get more clicks
    - More clicks = More clients

# Internet Presence: Your Website - Analytics

- Aside from SEO you will also need analytics
  - This is detailed reporting of your visitors:
    - From what city they visited your website
    - What search terms they used to find your website
    - How long they stayed on each page
    - What Internet browser they are using
    - From what sources you are getting web traffic
      - Search engines, direct visits, links on other websites
- Google Analytics is free and powerful
  - You may need help setting it up

# Internet Presence: Social Media

- Facebook
  - Keeping in touch with social friends
  - Keep it professional!
    - No drunken nights on the town
- LinkedIn
  - Keeping in touch with business acquaintances
  - Recommended if you want referrals
- Online communities
  - Forums
  - Blogs

# Internet Presence: Ethical Considerations

- Is what you are doing creating an attorney-client relationship?
- Are you soliciting a potential client using real-time electronic means?
  - MRPC 7.3(a): “A lawyer shall not by ... real-time electronic contact solicit professional employment from a prospective client when a significant motive for the lawyer's doing so is the lawyer's pecuniary gain...”



# Internet Presence: Ethical Considerations

- Is what you are doing considered attorney advertising?
  - MRPC 7.2(b): “A copy ... of an advertisement or such other communication shall be kept for at least three years after its last dissemination along with a record of when and where it was used.” *Emphasis added*
- Retain previous revisions of your website!

# Internet Resources

- MSBA listservs
  - Listserv just for Maryland practitioners
  - The Solo & Small Firm listserv is very active
- ABA Solosez listserv
  - Listserv for legal professionals across the country
  - Warning: No attorney verification process

# Wrap-Up

- Technology can make your life easier
  - But it can also make your life more difficult when it fails (and it will fail)
- Always remember ethical rules
- Online and offline reputations last forever
- The best piece of technology to invest in:



# Thank You!

Are there any questions?

Feel free to contact me:

E-Mail: [nick@proylaw.com](mailto:nick@proylaw.com)

Phone: (443) 352-8517

Web: [www.proylaw.com](http://www.proylaw.com)