8 Legal Tech Tips for Law Office Administrators

Written by Tom Lambotte

It's no secret that office administrators at law firms wear many different hats. One responsibility that often does not receive the attention it deserves (at least not until there's an emergency) is managing technology effectively at one's law office.

Below are eight technology tips for law office administrators, shared by an ex-office administrator who has since joined our team at GlobalMac IT. She now works directly with other law firm office administrators, helping them with their technology needs.

These tips came from a discussion centered around this question: "If you were speaking to a new office administrator, and giving them tips about technology, what are the things you knew when you left that you wished you had known when you started?"

My hope is that these ideas will help you better manage technology at your law firm, whether it's your first week on the job or whether you've been at it for years.

1. Clarify asks for new technology

It's common for someone at a firm to get excited about how the latest whiz-bang app or gadget is going fix everything. They'll likely ask to get it moving forward ASAP, but these quick-fire solutions can lead to multiple issues: The technology may not be properly tested ahead of time, or features of the new tech may already exist within solutions the firm currently uses, which can cause confusion. A shiny new solution may seem great, but it may not be the best option for your firm.

I recommend having a set of questions for every idea that comes in to clarify what's being asked for and ensure the solution chosen will be a good fit:

- Purpose: What do you want to accomplish?
- Importance: What's the biggest difference this new solution will make?
- Ideal Outcome: What does the completed project look like?
- Success Criteria: What has to be true when this project is finished?

Taking the time to define these will go a long way in capturing what is expected and why.

2. Be intentional with trial periods

These days, trial periods for new technology are rarely leveraged properly. It is not uncommon for some law firm IT managers to skip the trial period for new software and jump right in, figuring things out along the way.

However, this approach often reduces the chances that new technology will succeed at your law firm.

If you've asked the right questions to clarify what's being asked of a new tech solution, you've already determined what you are looking to get out of a new solution, i.e., your success criteria.

Before you even sign up for a trial, you need to create a list of success criteria so you can quickly and intentionally look for what you need. If you sign up for a trial and aimlessly poke around the software, you may see things you like, but you may also forget to check for some of the most important items needed.

Another tip when it comes to trials is to ask for extensions when necessary. As a law firm office administrator, your schedule can change quickly, and you may not have as much time for a software trial as you originally thought.

If you signed up for a 14 day trial only to have the next two weeks dedicated to another, more critical project, don't hesitate to email the vendor you're considering, explain your situation, and request an extension. While not all vendors will accommodate you, many will, especially with an explanation.

Some vendors offer personalized demonstrations, making it even easier to evaluate new tech solutions despite your busy schedule. For example, you can schedule a free demo of Clio, and get your questions answered quickly and efficiently.

3. Think long-term with a SWOT analysis

The conducting of a SWOT analysis (an analysis of the strengths, weaknesses, opportunities, and threats of a given decision or business venture) can often be relegated to leadership meetings with highly paid consultants, but there's no reason its application should stop there. Given the many roles you must fill within the firm, it is easy for your time to be sucked into a vacuum. It is critical to take some time to plan and look into the future—otherwise, you'll find you spend all your time putting out fires rather than addressing the source of your firm's issues.

Consider: In the book Awaken the Giant Within, Tony Robbins tells a story about a man walking by a river who hears someone screaming. He runs to the river, sees someone drowning, jumps in, saves the person, and brings him ashore. A minute later, another person comes down the river screaming. He jumps in again and brings him ashore as well.

This occurs repeatedly, and before the man knows it, he's so busy dragging people out of the river that he never has the time to go up the river to see how they are getting there in the first place. The busyness of managing a law office can often lead to this feeling.

Taking the time to conduct a SWOT analysis for a new project or solution will add a lot of clarity and help you determine where your time and energy should be focused.

4. Work with a technology expert

Often, when a challenge or project presents itself, the first question we ask ourselves is HOW. How will we roll out this new solution? How will we make sure we have proper buy-in from the team? How will we make sure that all the data is properly migrated, and that everyone has the proper training to use it in the way it will probably be used?

I want to challenge you to ask WHO instead of HOW. Who can make this project a success? Who can give you the information you need to make the right decisions? Who can best conduct the tasks needed to make the project successful?

Don't try to do everything yourself. You're not designing your law firm website or managing the firm's SEO, so why would you be the one to manage all the technology in the firm? You need to *oversee* the implementation and use of technology at your law firm, but updating all hardware and software, handling computer upgrades, all while providing help desk support to your team is a tall order.

Not having an expert to take care of these things will take you away from the other roles you are also responsible for. It is better to have someone and not need them than to need someone and not have them. If your firm has no knowledgeable, trusted IT provider, find one.

5. Take big changes slowly

Change takes time and planning. Also, people need time to adapt to change.

In the past, some clients would bring a laundry list of projects to my IT firm and ask to implement them as fast as possible. We no longer do this. Ever.

Why? Every time, we were able to complete and deliver the projects, but the firm was not prepared for the accompanying process changes and potential issues.

It is critical to outline a detailed launch plan before implementing a big change in office technology. This means mapping out potential issues, coming up with a clear set of desired outcomes, and drafting a well-defined statement of work that details what will be done to prepare for new tech within the firm.

It's also imperative to think about how your staff will take to the change. Not everyone adapts well to change, and a lot of big changes in quick succession can lead to frustration within a firm.

Plan thoroughly, take your time, and allow time for your staff to adapt to the changes. For example, if possible, you may want to launch new tech slowly, starting with your most technologically-inclined staff, or with a single team within the firm. This will allow you to identify and troubleshoot potential issues before rolling out new tech to the rest of your firm.

6. Know the technology you have

In addition to implementing new technology correctly, it is absolutely critical to have a firm grasp of the technology you have in place now. You don't need to know all the nitty-gritty details, but you should be prepared should a crisis arise.

It's easy to ignore this, until something happens. Consider this: When my wife and I go out and get a babysitter, we always leave a list of emergency contacts. Do you have that for the firm? As a starting point, you'll want to know:

- The contact information for your internet provider
- The contact information for your VOIP/phone service provider
- The location of your modem and/or router, who set them up, and who can service them.
- The contact information for all your critical hardware, software, and other technology services.

A good check is to run through the 'won a lottery' scenario. If a given person at your firm won the lottery, how would that impact your firm?

When our office administration specialist left her previous law firm, she debriefed the managing partner on all key documentation, but he didn't pay close attention until she got to the section covering technology. Only at this point did she notice his eyes get big as he realized how impactful, complex, and important law firm technology is.

When a crisis (or a lottery win) strikes, you don't want to be caught off guard—you want to know the basics so well that when something happens related to your firm's technology, you take it in stride.

7. Know who decides how and when to implement law firm technology

With technology at your law firm, who decides? Do you have a process in place to plan and roll out technology management, solutions, and changes? Or is it the Wild Wild West, where you are stuck reactively picking up the pieces left in the aftermath of trailblazers?

Everyone in the firm needs to be clear about who makes decisions about new technology, and who manages those projects. If you let everyone in the office decide on new technology needs and projects at your law firms, you'll end up with a hodge-podge of half-rolled out solutions, likely with many overlapping features.

Discuss the decision-making process with the head attorney or managing partner at your firm, and create a clear process for technology management and change requests. You could have yourself or a partner act as final decision maker for all requests, or you could have more than one final decision maker, depending on the type of request.

When it comes to rolling out new technology, it can be useful to assign a DRI, or directly responsible individual, for different aspects of the project (for example, you may want to ask a particularly tech-inclined paralegal to head up the change management aspect of implementing new software for staff). Depending on the size of your firm, the RACI model (deciding who is responsible, accountable, consulted, and informed) can also be useful for clarifying responsibilities.

Read how Palace Law, a Tacoma-based personal injury firm with 22 staff members, successfully implements new tech processes seamlessly.

8. Set clear expectations for apps used at work

If you've got a few tech-savvy staff members at your firm, they may get a new app, tell another person it's great, and then set it up for them to use at work. Meanwhile, no one else at the firm knows how to use it, or that they are even using it. This can cause serious issues.

For example, if a password manager were to experience a security breach, an office administrator might not mention the issue if she doesn't know that two staff members are using the app. Meanwhile, key passwords for apps used at your business may be at risk.

The lawyers at your firm have a duty to understand the benefits and risks of technology—so far, 31 states have adopted an ethical duty for technology competence—but they also have a duty to keep client information confidential, and breaching this ethics rule has the potential to lead to a malpractice claim. Not all vendors are created equal, and it's important to assess every vendor to make sure they've got the appropriate security measures in place.

Another issue is the proliferation of different tools. If clear expectations are not set, before you know it, there will be seven PDF tools in use, creating chaos because no one has the time to answer questions about seven different apps for one business need.

The best way to handle the proliferation of different apps and services at your firm is to outline a clear policy for the implementation and use of any new apps. If a staff member wants to use an app or service of their own choosing at work, set the expectation the app must first be assessed by yourself or someone else at the firm, and that it must be deemed secure and appropriate before it is used.

If there is overlap with another service or app your firm already uses, ask the staff member why he or she isn't using the existing solution, and see if there's a way to solve that problem before investing in a new tool.

Conclusion: Success with law firm technology comes down to your approach.

Managing technology at a law firm can be a daunting task. Some may even liken it to herding cats. However, by taking the right steps, the technology side of your firm can run more smoothly than ever before:

- Decide on the decision-maker. Don't let yourself be pulled in multiple directions while nothing gets done: Have your firm confirm a clear decision-maker for new projects.
- Ask the right questions. Before agreeing to a new project, clarify what's being asked for, and make sure the problem isn't already being solved by a current solution.
- Take time for change. Rome wasn't built in a day, and your new office tech won't be up and running and loved by all staff in one week. Manage expectations correctly, and have a clear roll-out plan for new tech.

What's next? Think about which two tips from this list would make the most significant improvement in the firm over the next 90 days, and look for ways to implement them.

If your current role does not allow for any time, ask your IT provider to see where they can assist you. Just because you determine WHAT needs to be done, it does not mean the WHO has to be you. You just need to see that it gets done.

About Tom

Tom Lambotte is an author, speaker, IT advisor, security expert, and the CEO of GlobalMac IT, an IT provider helping growth-minded, Mac-based law firms transform operations and increase efficiency by leveraging technology. The company's unique process defines their clients' biggest dangers, opportunities, and strengths. GlobalMac IT has been a Gold level Clio Certified Consultant since 2015.

About Clio

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