Introduction
by James A. Calloway, Esq.

“Our inventions are wont to be pretty toys, which distract our
attention from serious things.”
—Henry David Thoreau

“Forget artificial intelligence—in the brave new world of big data,
it’s artificial idiocy we should be looking out for.”
—Tom Chatfield

“It’s only artificial intelligence until you understand it—then
it’s just software.”
—Originator unknown

The increasing pace of technology–fueled change continues to dominate the
business landscape today.

There are many publicly held companies with large valuations that didn’t
exist ten or fifteen years ago. In fact, it would have been challenging even
to explain to the average consumer of ten or fifteen years ago the nature
of the services that some of these companies now deliver. The iPhone was
unveiled to the public for the first time on January 9, 2007 (and it couldn’t
even copy and paste.) Now you can look at almost any group of people in
public and the majority will have their faces buried in their smart phones.

CryptoLocker, which opened the era of ransomware attacks, was believed to
have first been posted to the Internet in September 2013. Global ransom-
ware damage costs are predicted to exceed $5 billion in 2017. Paying the
ransom is increasingly no longer an option as the criminals don’t provide the decryption key about 50% of the time.

Yes, Ferris Bueller, life does move pretty fast today. This is particularly true where technology developments and consumer preferences are concerned.

The legal profession has developed a reputation for being resistant to embracing technology changes. That is understandable for a profession that attempts to forecast the future by examining the past (precedent) and is very unforgiving about mistakes.

Your “tools of the trade” today, and in the future, are technology tools. Shopping for these tools can be a challenge. The vendors of these tools present their case that their tool is the absolute best and perfect for your type of law practice.

I sit through several software demonstrations every month and have done so for years. I’ve seen some great products in their early stages. But there is one thing I have learned about software demonstrations. With a little preparation, one can make any software program look great in a demonstration. The strategy is to linger over the strengths and breeze past the weaknesses.

Objective and accurate information about technology tools is critical. Fortunately, if you are reading this introduction, you are holding a significant part of the answer in your hands. The 2018 Solo and Small Firm Legal Technology Guide provides objective information about the products that you need to successfully practice law. Sometimes this book will help you make a final decision when trying to select the best tool among competing products. On other occasions, this book will help you with a baseline understanding of what a particular product or class of products is supposed to help you accomplish.

When faced with many options, narrowing the search to one or two options is invaluable. This guide may be a starting point for a lawyer who wants to do further research, supplementing its information with reading other product reviews or discussing with other lawyers their satisfaction with the technology tools they are using. The authors of this guide would likely encourage that approach. But the guide is written so that it could be the only source if there was some urgency attached to the purchase.

From hardware to software, from gadgets to online services, a law firm today has a broad range of technology needs. Making smart decisions about technology purchases is a goal we all share. The budget for
technology purchases is never unlimited and we all appreciate that it is possible to spend a lot of money on technology upgrades. Legal technologists have all seen situations where a large investment in technology failed to deliver the hoped-for results.

Lawyers today have different attitudes and approaches to their personal use of law office technology. There are those some label as Luddites, lawyers who see investments in technology tools as an expense that will provide little personal benefit to them and may involve retraining or other investment of time that is better spent serving clients and generating revenues. There are those lawyers new to the profession, who have grown up using technology-based tools as a part of their lives. They expect the latest and greatest technology tools and are sometimes puzzled by the aversion to technology investments by more senior lawyers. Then there are the futurists. These are the lawyers who attend conferences like ABA TECHSHOW and see our profession in the early stages of rather profound and fundamental change. They can exhibit an evangelical fervor for change. This passion is both puzzling and threatening to the traditionalists.

This guidebook can serve as a law firm’s trusted source of basic information as well as in-depth information. It is a quick reference guide to understand where a new product or software release fits into a law firm’s overall strategy. The authors of this guide bring their long experience working with the legal profession to the pages of this volume. It is certainly the most cost-effective technology resource that any budget-conscious law firm could hope to obtain. But it is also written in simple, plain English terms that make it useful for those with a limited background or interest in technology tools.

Recently a popular theme of articles about technology for lawyers has featured some theory about when Artificial Intelligence takes away your job or replaces lawyers entirely. Others respond that there is no way AI can replace lawyers or replicate the human brain.

The truth lies between these extremes. AI is transformative. AI is a tool that lawyers will use to improve their work product and efficiency. But for most solo and small firm lawyers, there are more urgent priorities than AI demanding their attention today. These include incorporating automated document assembly and fixed fees for routine documents, embracing the efficiency of digital client files, developing online marketing tools and improving their personal technology skills.

Technology advances have changed the nature of our work. Modern word processing tools with templates and the ability to use forms slowly reduced
the need for the large firm typing pool. The pervasive use of e-mail in business changed the way discovery is managed in litigation, initially generating a lot of manual document review work which has given way to TAR, Technology Assisted Review.

The only constant in business today is change, as painful as that may sound to many in a profession dominated by tradition and precedent.

But at least the future of the practice of law will not be boring.