“Technology seems to advance at the speed of light these days. Each year there are more and more products – many of which claim to do everything but tuck you into bed at night. Although we who serve State and local Bar members as practice management advisors do our best to keep up, we can’t do it alone. Luckily for us, and for solo and small firm lawyers, technology gurus Sharon Nelson, John Simek and Michael Maschke, of Sensei Enterprises, step in each year and review some of the top products. From software to hardware, with lots in between, Sharon, John and Michael help us to narrow down the choices and try to get the best products for a reasonable price.

This book is a must have in our reference library; we wait each year for the new edition to come out so we can study the recommendations, logically explained, in our quest to assist our members in making the best choices to serve their technology needs. Sharon, John and Michael focus on vendors who offer transparent pricing, products that are intended for business rather than consumers, and are best suited to solo practices and small firms.

In the wake of the COVID-19 pandemic, and lawyers consequential increase reliance on technology, this book is now more than ever a valuable resource. Put it on your yearly “must have” list along with a call to your Bar’s practice management program.”

—Roberta Tepper, Co-Chair, ABA TECHSHOW 2021

“Besides reciting specifications, statistics and acronyms, the authors often refer to their experiences assisting solo and small firms with their technology challenges while sharing their casual observations. I feel like I am sitting in a room with the authors chatting about law office technology. When they described human blood as cheaper than inkjet cartridges, I sensed their honest caring for your law firm’s budget. As for the accuracy of Dragon Naturally Speaking, it is described as “astonishing.” Must reading is the description of Microsoft Office with its several cloud and desktop iterations.

I agree with their recommendation to query your lawyer colleagues about their own choices of technologies and subsequent experiences. The authors mention “practice management advisors” twice. Seek this person out at your state bar for local guidance with law office technology, particularly case management software. An example profiled is MyCase. Its terms of service cite the laws of California for dispute resolution. A U.S. jurisdiction is not always the venue with cloud vendors, so be sure to read the terms of service.

You may be aware of the website www.capterra.com. It offers a listing of software and says, “...you can access the full universe of possible options available to you to find your match.” Perhaps, but the operative word is “universe.” Which lawyer has the time? This book focuses on your “solar system”, not universe, of options that benefit from the wide knowledge of the authors and thereby saving you a huge investment of time and likely frustration. The self-imposed limits on the scope of the content to only known and reliable resources reflect the authors’ many years of both sitting on the 50-yard line and visiting the locker room of law office technology.
The book deals with front office, back office, infrastructure and the future: “Tomorrow in Legal Tech.” This last topic is sobering to read. The words, “fake” and deepfake” are used 40 times. Need I say more?

The wide-range, changing nature and emerging risks of using law office technology demand someone stand at the gates and determine what technology is worth knowing about and why. That "someone" for the legal profession are the authors of this 216-page valuable annual guide. Call this very accessible book a textbook or a reference work, but don't call it a disappointment.”

—Peter Roberts

“When you first see that the 2020 Solo and Small Firm Legal Technology Guide is 216 pages long, you might be intimidated to start reading but you should. It is an easy read despite being comprehensive and detailed (because the subject matter is packaged in digestible bites). While perfect for solo and small-firm lawyers trying to sort out their technology set-up, it is equally helpful to any small businessperson as it is all about what you need to successfully and safely do business in this hyperconnected digital economy (made even more important because of the remote work being done due to the pandemic). The authors (two of whom I have known personally and professionally for almost 15 years) lay out, in a rather logical order, the technology components to set up and maintain a law practice, along with their recommendations based on due diligence and, in some instances, personal experience.

You don't need to be a technologist to understand the content, but it is smart to engage professional help to ensure configuration/implementation of these tools is done competently and safely. Few legal professionals have the credentials, intellectual curiosity and decades-long experience of the authors—you can take their advice to the bank. Most importantly, this Guide is clearly written and practical to use. I have even purchased some of the recommended products after reading this latest edition. A year ago, I did some work in Australia launching a cyber law firm focused on the legal sector and this Guide is exactly the resource I would have recommended to clients. While focused on maintaining the requisite confidentiality and security of information flows in the practice of law, many of the recommendations work just as well for those setting up non-legal small businesses (or even home offices).

Given the focus in the news on the importance of securely managing information and IT systems, this Guide should be on the reading list of every single solo practitioner, as well as all managers of small law practices, if only as a check-list against which to map their present environment or future decisions. 2020 will be known for many (awful) things, but most definitely also for a massive, forced digital transformation that this Guide can help with.”

—Christina Ayiotis, Esq., CRM, Cyber Strategist
“Technology infrastructure is one of the most important investments any solo practitioner or small law firm can make. In this day and age, no business can survive without these tools. This comprehensive and practical guide helps firms evaluate their needs and determine which products will best meet those needs. The book is laid out in a clear format that allows readers to navigate easily through the various sections, while still providing meticulously researched information.

Spring 2020 brought a huge shift in how most law firms operate. When firms were no longer able to conduct business in the office, a firm’s technology infrastructure determined how successful they were in conducting work remotely. This book is a must read for all firms to help them function not only when it is “business as usual” but when it is “business unusual” as well.”

—David Ginsberg, Partner, Cooper Ginsberg Gray

“Once again, Sharon, John and Michael have hit a home run with this year’s edition of the essential IT desk reference for sole practitioners and small law firms.

This is an invaluable resource tool for solo and small firms with technology needs—and we all have technology needs. I have personal familiarity with the daily challenges of practice in solo and small firms, having been a solo practitioner for twenty-two years and, since 2008, growing my practice into a six-attorney firm.

From the Table of Contents to the Index, this is an easy to use and highly readable reference source for an attorney like me who does not have an IT background and is IT challenged. It will help those who are diligently trying to improve their knowledge of hardware and software options to provide more efficient and economical service to clients within the limited budget and challenges of being a solo or small practitioner.

The need to understand technology, and benefit from the efficiencies these tools provide, is especially critical in today’s highly competitive environment with the need to achieve cost efficiencies for our clients and the expanding ethical requirements related to basic professional competence.

Moreover, when a specific time-sensitive need arises, this highly readable guide transforms into a practical resource tool with specific recommendations on equipment and explanations to help an attorney make an informed purchase to best meet the immediate IT need within budgetary constraints.

I highly and unequivocally recommend this book to other solo and small firm practitioners.”

—Jay Myerson

“After reading each year’s edition since 2016, I have the great pleasure of reviewing the 2020 Solo and Small Firm Legal Technology Guide. Sharon, John and Michael’s years of experience in the legal industry come to a sharpened point in this book to help cut a path through marketing and sales pitches to
provide lawyers insights into what technology they actually need to run a law office. They do this with ease, laying out the material by in a straightforward “brass-tacks” easy-to-read format. I plan on using parts of this book as required reading in my Technology in Law Practice course at the University of Oklahoma College of Law as a potential roadmap for the next generation of law students in creating technology infrastructures in modern law offices.

The book contains suggestions on all aspects of law firm technology, broken down into chapters that deal with the variety of needs that a typical small law office would have. I fully appreciate how the chapters read: direct and brief, focusing on tried and true suggestions with pricing options. Starting first with hardware, the book lays the foundation for what lawyers need. I cannot stress this enough. While most law students, as well as attorneys, are accustomed to using consumer-based hardware sold through discounting and shiny, “prosumer” marketing pitches, the suggestions and recommendations in this book provide a practical, experienced framework for what lawyers really need – processing power, memory, and security to run a productive law office.

Additionally, the book provides a sobering wakeup call for the newer attorney (at least the ones I deal with). Technology needs of a law firm go well beyond a laptop and smartphone. Instead, a wholistic technology infrastructure is needed. The book handles this with ease, breaking down all technology components of a firm, including incredibly practical information about servers, networking, and security to make sure a firm is always working. The book goes further. It discusses all manner of software needed for a law firm, including the core component to a law firm – the case management system. While there are a host of vendors in this space, the recommendations provided are a great starting point and highlight the absolute necessity for these systems in a modern law office.

I do wish the book had covered more software options in other areas, especially when it comes to innovative solutions in the market that are leveraging the cloud, however, I understand why it does not. The major reason I will be using this book as required reading in my course, is that Sharon, John, and Michael provide a sobering reality woven through all parts of their recommendations. Technology must be secure, as much as possible. This is partly why there is not as many recommendations for cloud-based software. Lawyer’s decisions on what to purchase, license, and leverage must keep their ethical duties to reasonably protect client data at the forefront of the requirements process, not as an added benefit. This is what makes this guide so valuable. Sharon, John, and Michael’s experience and expertise in cybersecurity and data security flow through every chapter, providing lawyers, my law students, and other legal professionals with realistic and practical options to run a secure, productive law firm.

*The 2020 Solo and Small Firm Legal Technology Guide* is a fundamental resource for all attorneys desiring to understand what technology they need for their small law office. I cannot wait to see what they come up with in 2021!"

—Kenton S Brice, Director of Technology Innovation, University of Oklahoma College of Law