Reviews

This book offers a comprehensive practical guide for any small law firm evaluating its current technology tools or looking to build its technology infrastructure. The book does an excellent job of explaining why you may need a certain type of technology or product, and then it guides you through the practical advantages and disadvantages of each product in easy to understand language. After reading this book, you will have no problem identifying what technology you want and which product best suits the needs of your firm.

The authors methodically and thoroughly review all of the technology options that you may think of on your own, and then they introduce you to options that could put your firm ahead and also give you a glimpse of the technology heading our way. The book is user friendly in that it provides an in depth look at technology while remaining easy to navigate from topic to topic. If you are setting up your practice or looking to upgrade your technology, this is a must-read book.

David L. Ginsberg
Esquire, Cooper Ginsberg Gray, PLLC

Sharon, John and Michael have once again provided an invaluable resource 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 understandable 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.

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

Jay Myerson
Founding Attorney, The Myerson Law Group, PC

I am not a computer geek, but I am an avid observer of the law office tech scene much like you may be. I have also had experience helping attorneys choose software.

I believe the changing nature of law office technology demands someone to stand at the gates and determine what technology is worth knowing about and why. That “someone” are the authors of this valuable annual guide. Call the book a buffet or call it a textbook or call it a reference work, but don’t
call it a disappointment. Besides reciting specifications, statistics and acronyms, the authors also often refer to their experiences actually assisting solo and small firms with their technology challenges and they share their observations and opinions about what they see out there. In some ways, I felt like I was sitting in a room with the authors simply chatting about law office technology. When they described a certain technology was “more expensive than blood” they kept my attention. And I agree with their recommendation to early on query your lawyer colleagues about their own choices of technologies and subsequent experiences.

Where is the glossary of tech terms? Such a list is missing, but the terms are defined within their contexts where used. I note “evergreen retainer” is not defined. Appendices? No. The lists of discrete issues or questions that might comprise one or more appendices are embedded with the text. Must reading is the description of Microsoft Office with its several current iterations. The Corel Suite is also described for the lovers of Reveal Codes. As for the accuracy of Dragon Naturally Speaking, it is described as “astonishing.”

The book scripts you for what to ask the tech vendors as you consider practice management software. My recommendation has always been to lean on your office tech go-to person for these conversations with the vendors. Clio, the cloud-based offering based in Canada is included yet heed the authors’ counsel to read the terms of service of any vendor. In Clio’s case, the terms of service near the end describe that you will deal with the laws of Ireland in the event of any dispute. The discussion of Quickbooks is helpful especially noting the training help available from night courses at community colleges. A major quality of the book is its self-imposed limits on the scope of the content to only known and reliable resources. Yet included is Kurent, “new to the scene in 2017.” While that phrase rhymes, I am not sure I would burden the reader with software with such a short track record.

Finally, when you spot the book and/or purchase it, turn immediately to page 180 and absorb the good counsel under the heading, “Many Lawyers Need a Digital Detox.” Truly, this is food for thought.

Peter Roberts
Practice of Law Advisor

In 2019, few lawyers understand all the technology we need to use – and clients insist we use – to practice law. That’s why we need help, and much-needed help is here in the ABA’s The 2019 Solo and Small Firm Legal Technology Guide, by tech gurus Sharon D Nelson, John Simek, and Michael Maschke.

In just over 200 pages, the 2019 edition of this great book brings very current, plain-English, practical and direct advice on legal technology that’s specifically crafted for small-firm and solo lawyers. Any lawyer practicing solo or in a small firm – including many lawyers in one-lawyer or small in-house law departments – will find clear and direct guidance on virtually every legal tech topic.

It covers everything from email to document management systems to cloud computing, and everything in between. There’s not-quite-techie advice, too – time to give up your JaneSmith1978@gmail.com address as not nearly professional enough. And some advice to go lower-tech – for some practices, think about using plain-old computer folders rather than springing for a fancy document management system.

Even if it’s not a complete substitute for your own IT consultant, its unerring advice will let you to make some tech decisions on your own and enable you to make more much intelligent decisions in
consultation with your personal tech guru. What Consumer Reports new-car issue it to car buyers, The 2019 Solo and Small Firm Legal Technology Guide is to lawyers needing to make tech decisions.

This book may not change your life – that depends on how badly you’re in need of good tech advice – but it will save you hours searching for straightforward advice aimed at lawyers. And you can’t go wrong following advice from Nelson, Simek, and Maschke.

Lucian T. Pera
Partner, Adams and Reese, LLP

I would like to preface my review to say that this is the fourth edition of the famous Legal Technology Guide that I have had the privilege of having in my library. As a solo attorney, I have found these guides indispensable in my practice. Legal technology seems to evolve at a much faster pace than any other area of law, and a current version of the Guide is a must.

It was extremely fun to read this year’s edition and compare it to the first edition that I bought 10 years ago, the 2009 Legal Technology Guide. My how legal technology has changed. Ten years ago, Apple was just coming out with its second-generation iPhone. CRT monitors were phasing out, and LCD monitors were the new rage; the recommended monitor was a 17 – 22 inch monitor. Security issues centered on anti-virus software, and a trip to “the cloud” was still in its infant stage. My, how times have changed and how we have advanced in legal technology!

Being under the mistaken impression that I am somewhat tech savvy, it was startling to me to read the 2019 edition of the Solo Small Firm Legal Technology Guide to realize how much I need to educate myself on so many technology issues. Of course, like any solo or small firm attorney, financial constraints will force us to make some compromises in what we need versus what we can afford.

The biggest issue technology wise, and as set forth by the writers is security. Security in our laptops, security in our networks and security in our mobile devices, phones and other “smart” devices are all landmines for any law firm, but for solos and small firm lawyers, a data breach or an attack by ransomware could devastate a law office. For the security issues alone, an up to date copy of the legal technology guide should sit on your shelf, right next to the contact information of your IT professional.

Let’s look at the major topics contained in The 2019 Solo and Small Firm Legal Technology Guide. The Guide starts the reader with basic hardware requirements in searching for a computer. Both Mac and PC’s are covered, as well as laptops and tablets. Comparative prices for all the above systems are also set forth, to give the reader a good idea of what to expect. The book’s reliance on Dell as the brand of choice for PC’s is helpful, but I would recommend shopping online for several brands with similar specifications.

Operating systems for the hardware are limited these days to Windows 10 and MacOS Mojave Version 10.4. So, your hardware and software choices will be determined by the hardware system you choose.

Computer peripherals such as speakers, keyboards, mice and storage devices are all given their due. Printers as well as multifunctional devices, and scanners each are addressed. I agree wholeheartedly with the authors that as far as personal scanners go, the ScanSnap iX500 is the only way to go as far as personal low volume scanners. I rarely use our high-volume scanner at the office except for extremely large files, such as medical records or voluminous discovery or trial exhibits.
The most interesting chapters in this year’s edition for me was the quite thorough review of small office servers, server operating systems and Networking hardware. Sorry as it is to realize, your server has operating life of only 6-8 years, so you always must look ahead and anticipate the ultimate demise of your server, or the discontinuance of your server operating system. Be prepared for sticker shock when upgrading the wiring system in your office from Cat 5 to Cat 6, but as the authors point out, newer systems need to be upgraded from the ground up.

The authors do a good job of setting forth productivity software, case management systems, document management and document assembly – all vital to the best and fastest use of technology in a small office. Most of my colleagues (and I) have migrated to cloud-based systems for purely economic reasons. Clio started the trend about 10 years ago, but Clio is no longer the most affordable system on the market. As the book points out, there are many, many different systems and different price points for each.

Remote access to your computer has been around since the 1st edition of the Guide, but a review of newer technology, software and security is always helpful, and is contained in this years’ edition.

If you only read a few chapters of *The 2019 Solo and Small Firm Legal Technology Guide*, it would be wise to include those dealing with security and mobile security. Many lawyers, especially solo or small firm lawyers do not realize how vulnerable they are, security wise using mobile devices. Although you may need a technology translator on the specifics, the book points out the vulnerability you face using non-encrypted email or logging in through open or public Wi-Fi. (Isn’t everyone use a VPN?)

Well, that’s *The 2019 Solo and Small Firm Legal Technology Guide* in a nutshell. It’s a quick read, easily finished in an evening or so, but a great resource for all your technology needs. Keep a current edition on your shelf at the office.

Marc Matheny
Principal Attorney, Marc Matheny Law Office