What we hope to do with this book is simple: We want to help solo and small firm lawyers find the “sweet spot” of legal technology—the best value for the dollars. You don’t need a yacht, and you won’t be well served by a rowboat. But there is a happy medium—professional-grade hardware and software that doesn’t cost an arm and a leg.

This guide is an annual one, so you can’t go too far wrong with our advice. Some chapters will remain current for the entire year. At worst, we’ll only be several months behind the curve. Still, if you can’t afford your own legal technology consultant and you are concerned about those who may be selling you snake oil, at least this book should provide you with an overview of recommended legal technology products for solo and small firm lawyers.

As always, the parts of this book that age quickly are the hardware specifications. We are happy to give you our latest specs—just drop us a quick line at sensei@senseient.com. We’ve given out hundreds of updated specs over the years, so don’t hesitate to write!

We do our absolute best to be vendor-neutral. Readers of previous editions will be keenly aware that our advice has changed from year to year as some products improve and others decline—sometimes precipitously. We have some exciting new products to talk about this year—nothing moves as fast as technology!

This is the only book we’re aware of that deals with legal technology on a collective, annual basis. We are pleased to have a growing, loyal readership looking for independent advice on legal technology and who find a yearly dose of that advice compelling.

This year, as we did last year, we have focused on the core technologies of the law office, opting to make the book more condensed and focused. The feedback over the last two years has been very good, with readers
welcoming a more compact book focused on the essentials of legal tech—and finding it much easier to read.

Our recommendations are what we would do in a solo or small practice ourselves: Invest in quality technology that will have a good shelf life and serve you well—that means buying business-grade (not consumer-grade) technology. Don’t expect more than the machines can give. A server can be expected to last four to five years; a workstation or laptop, three to five. That’s it, folks. When the warranty is gone, replacement is often the smarter move. More often than not, the solo or small firm practice is using cloud services (e.g. Office 365) and no longer investing in server hardware. You’ll still need a computer to work, and typically that means a laptop for mobility purposes.

As the software also evolves, it demands ever more resources, and the hardware ages both physically and in its ability to handle the new software. Remember the Rule of Three in upgrading: You should be upgrading one-third to one-fourth of your technology each year. Sometimes you can stretch it to five years, but if you try to limp along patching things with spit and promises, you are likely going to be in for a “big bang” upgrade, which is acutely painful to the average solo or small law firm. Leasing may help lessen this financial burden (at least on an annual basis), but you lose the option to change course quickly without paying penalty fees.

Be mindful of the fact that this book is written for solos and small law firms. There is no attempt to include big-firm products or solutions, though many big-firm lawyers have enjoyed portions of this book and found the information useful to firms of any size. In addition, we want to stress that we have included only our recommendations, not all available products. If you don’t see a product here, it is because that product is not among our usual recommendations. This is a best-of-breed selection to keep you from being confused by the veritable cornucopia of choices that exist. No one has time to wade through all the choices, so we’ve tried to give you limited but tested options that work.

We will repeat these words later in the book, but they are worth saying here, as you begin to read:

In some of our software descriptions, we are very critical of vendors who do not post pricing—they generally want to get you on the phone with someone from the sales department or give you an online demo, when all you want, in the beginning of your research, is some basic knowledge of features and pricing.
In the absence of pricing transparency by vendors, we encourage our readers to seek input from lawyers who actually use the products you are considering. Request specific references from vendors (though remember that those are likely to be cherry-picked!) and follow up on them. You will generally get some of the best counsel from practice management advisors. Listservs can be very helpful, as can local law practice management groups of state or local bar associations.

Like many other IT and cybersecurity consultants, we are now providing managed IT (information technology) services to law firms anywhere in the country. Today, we are moving folks to the cloud, using a data center in northern Virginia. This means we can now provide IT support nationwide and use remote access to connect to any part of your network that is not housed in the data center. Call us if this is an option you want to explore.

With all the law firm data breaches that have been reported in the last several years, our Cybersecurity Department has been hopping, investigating data breaches, assessing and securing law firm networks, running phishing simulations for employees, and doing penetration testing. We also offer employee training (educational and entertaining)—which is the only way to make the knowledge “stick”—and assistance with developing technology-related policies, including incident response plans. More information about our services may be found on our website, https://senseient.com, or you can call Mike Maschke at (703) 359-0700 for further information. Security assessments should be an annual (at least) exercise for all law firms—and they cost less than you might think. We are happy to give you a flat fee quote.

We are serious about our commitment to the legal profession and proud of our professional giveback through the American Bar Association. If you have a question, we’ll do our best to assist. Just email us at sensei@senseient.com.

We appreciate all your comments and suggestions, as they help make each subsequent edition of this book better than the one before. Thanks, in advance, for your continuing help!