TECHSHOW2018

HOW DO I CHOOSE? SELECTING AND IMPLEMENTING LAW PRACTICE TECHNOLOGY

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6.8   Because time and billing are essential features for all users of practice management solutions, time and billing features are available universally. However, the level of detail and customization of these functions varies. Similarly, the accounting features of law practice

1. Most technology products are not a one-size fits all proposition.

    1.1   The rapidly changing market of practice management solution vendors and the available features from these vendors makes it difficult to select a single solution that is "best" in every situation.

    1.2   The difficulty of selection as well as somewhat lower levels of satisfaction with practice management software might help account for a return to lower levels of adoption of practice management software in 2017 after a spike in use in 2016.[1]

    1.3   Consultants and "experts" may be familiar with the many features of various products, but it is difficult to keep up with the step by step processes and the rapidly changing feature sets of numerous practice management solutions. Notwithstanding, consultants and practice management advisors may be able to guide practitioners through the selection process and facilitate implementation.

    1.4   Consultants and "experts" are also not as familiar with the goals, workflows, and client needs of a law practice as the attorneys and support staff are. All of this information is essential when trying to determine the "best" practice management solution to help the firm or practice accomplish its goals and provide quality legal services to clients.

2. The subjective nature of intuitiveness and the need to obtain buy-in.

    2.1   How intuitive a particular practice management solution is may be a matter of subjective judgment. While one practice management solution may seem very intuitive to me, the same solution may not seem intuitive to others. This is one of the primary reasons that I strongly encourage inclusion of all staff and attorneys in the selection process. Their inclusion will help ensure that a system that is intuitive to the greatest number of users is selected.

    2.2   Because they are often very familiar with the sometimes-undocumented goals and operations of the firm and practice, support staff and other end users like junior attorneys can assist in choosing the solution that best integrates with the goals and current workflows of the practice. Involving members of the entire firm in the process will encourage buy-in and increase the likelihood that the practice management solution ultimately selected is used.

3. Keys to LPMS selection process

   3.1   The American Bar Association's TECHREPORT 2016, written by Josh Poje,
          contains good advice on the process of selecting a practice management
          solution. In the section on Practice Management, Poje suggests that attorneys
          review their current systems, research their options, consider possible changes
          to business procedures, and plan for training. selected.[2]

   3.2   As Josh Poje points out:

          Failing to clearly understand your current setup and how it is or isn't
          working for you is the easiest way to waste a pile of money [and time] on
          technology. The pattern is all too common: lawyer is frustrated by their
          tech; **lawyer throws money at the first alternative with a decent review
          (usually anecdotal from a colleague); lawyer switches and discovers a
          month or two later that the new tool did nothing to solve their
          problems**. [emphasis added].

   3.3   It probably does not surprise many of you that a significant number of attorneys
          may be unaware of the full capability of their chosen solutions. We often hear
          evidence that this is the case. As a result, a review of current systems is an
          important early step in the selection process, However, you must consider the
          goals of your firm or practice prior to reviewing whether your current system is
          meeting those goals.

   3.4   A Law Technology Today article, Five Steps When Choosing Law Practice
          Management Software, by Aaron Street, also suggests starting the process by
          examining the goals of the firm.

                 … the starting process for deciding which tools a firm should use
                 should begin with an analysis of the long-term goals of the firm.
                 For instance, solo firms intending to remain solo should have
                 different goals and needs than solo firms hoping to bring on
                 additional attorneys and staff. Small firms hoping to add remote
                 staff in the future have different needs than firms everyone
                 shares an office. Firms that offer alternative fee arrangements or
                 document automation have different needs than firms that have
                 no plans to ever alter their business model goals.[3]

   3.5   Only begin to look at features after other key steps have been completed.

3.5.1 Even with firms committed to following an appropriate process, there is a tendency to rush to an examination of the features available from particular practice management solutions. While law practice management solutions often have some similar features, they do not offer identical features. You need to establish the priority of your needs and then see how a product matches up to your priorities.

3.5.2 Tom Lambotte, President of GlobalMac IT, suggests that some of the more established case or practice management systems available have become what he terms "bloatware" because of the numerous features the vendors have added in response to user requests.[4] "The problem with adding on every feature request for 5, 10, 15 years or more is that features, when you are not able to easily access them, become worthless. The software becomes so intimidating and non-inviting to the user that it simply goes unused."[5] This is just a reminder that when you do begin to consider features, you may not want to look at the number of features but the set of features that will meet your goals.

3.6 Only begin to look at features after other key steps have been completed, including setting a budget.

3.6.1 Before starting to look at features and examine your options, establish a budget. "Shopping for new technology with a vague budget is an easy way to ensure you overspend."[6] Robert Ambrogi offers similar advice, "Determine your budget for a practice management system and then shop for systems that fit it. Prices range widely."[7] Ambrogi further notes that cloud-based systems charge monthly subscriptions ranging from $39 to $105 per user per month if paid annually.[8]

3.6.2 Remember that your budget should be realistic. Issues such as whether you will select a web-based system or a more traditional on-premises solution[9] will influence your budget. If you select an on-premises solution you may also need to consider if you will need to include the cost of a technology consult or IT support in your budget. Support is included with a web-based system subscription.

3.6.3 You should be aware that consultants make money in three different ways:

… (1) the consulting fee you pay for their advice, (2) re-seller commissions when they refer a sale to particular vendors, and (3) on-going hosting/support/training/customization contracts ... Pay particular attention to consultants who "always" or "never" recommend cloud-based software solutions for law firms, since those vendors may not be making recommendations based on the specific needs of their law firm clients, but on their own."[10]

3.6.4 When working to set a realistic budget, you should also consider the "murkiness" of the web-based practice management solution subscription costs.[11] While most LPMS vendors feature the subscription pricing on their websites, the cost of other applications integrated with the PMS or other factors, may result in significant pricing increases.[12] Thus, while there is some transparency regarding pricing of web-based systems, add-ons or upgrades may impact the pricing.

4. Only begin to look at features after other key steps have been accomplished. Also, consider that there are some resources that have collected information and reviews about the software features and operation. Just because a feature is available, doesn't mean it works well.

4.1 Before you begin researching whether a specific practice management solution has a specific feature, make "… a list of all features you'd like from your ideal practice management program. Next, prioritize those features [that relate to the firm's goals]. By using your feature list, along with your budget, you can home in on programs that might work in your practice. Look for the programs that excel in the features you need most …"[13] Selectors must "put in the time" planning and researching now before committing to a single practice management solution.[14]

4.2 Websites like SoftwareAdvice[15] and Capterra[16] provide access to reviews. In addition to reviews, Capterra also provides a list of features for particular practice management solutions. Further, Capterra allows users to filter the list of practice management solutions to include only those having the combination of features that the user has selected.[17] However, because the features information appears to be supplied by LPMS vendors rather than collected by independent parties, you should be cautious about relying strictly on this information without additional verification. Capterra also provides a "top features" comparison chart or guide.[18]

4.3   Lawyerist.com also provides a feature comparison chart.[19] While the Lawyerist's chart is updated periodically, users have to refer to another webpage for feature descriptions that may be somewhat vague. Many practice management advisors maintain such charts, but because information changes so quickly,[20] these charts are normally not distributed. In addition to discussing goals and budgeting, a practice management advisor will generally discuss feature information with bar association in person or by telephone to ensure the most current information is being provided.[21]

4.4   The American Bar Association's Legal Technology Resource Center (LTRC) previously provided a comparison of features available from a variety of practice management solutions. The LTRC chart was similar to those described above. Because the LTRC is no longer updating the comparison information, the link to the chart was temporarily removed, but it remains accessible via the Internet Archive[22] and the link to the chart has been restored on at least one LTRC webpage.[23]

5.   Caution: Taking a shortcut by simply selecting a law practice management solution that is listed as a bar association member benefit will not likely result in selection of the best product to support the goals of the firm.

5.1   Rather than engage in a lengthier process that begins with consideration of the firm's goals and includes examination of features, some attorneys may desire to turn to the state bar's listing of member benefits to see what practice management solutions provide a discount and are "acceptable" according to the bar.

5.2   Rather than engage in a lengthier process that begins with consideration of the firm's goals and includes examination of features, some attorneys may desire to turn to the state bar's listing of member benefits to see what practice management solutions provide a discount and are "acceptable" according to the bar.

5.3   Many attorneys take the following to mean that they should only select a practice management solution that is endorsed by the state bar association

> Many cloud service providers are upstarts or new side ventures for existing companies. The cloud service provider your firm entrusts its data to should be recognized by the ABA, multiple state bar associations, and generally be well regarded in both the legal and technical communities.[24]

5.4　But endorsement and inclusion on a membership benefits list are very different procedures. Most bars do not endorse practice management solutions despite the fact that the vendors of these solutions may offer discounts to members of the bar association. In fact, bar associations may provide a disclaimer stating as much.[25] As a result, attorneys should not interpret any list of member benefits as indicating that an included practice management solution includes specific features or meets the security requirements for acceptable storage of confidential client information in the cloud.

6.　While a discussion of all of the features of the most popular practice management solutions is beyond the scope of this session, it is important to discuss at least some of the features that are currently available via several practice management solutions and to call attention to a few features that currently are available only through a limited number of solutions. Why? Because one of the most common complaints of attorneys desiring to select software is that they don't even know what to look for. In many cases this is because very busy attorneys have not taken the time to do much investigation.

6.1　LPMS features are often divided into functional categories: (1) client management; (2) secure communication and email functionality; (3) tasks and workflows; (4) document storage, management and assembly (automation); (5) research and knowledge management; (6) integration, and (7) time and financial management.

6.2　According to the ABA TechReport 2016,[26] client management features include conflict checking, contact management, and client relations management (CRM). All attorneys need a conflict checking system. Many of the popular practice management solutions have a conflict checking feature.

6.2.1　In early 2016, it was noted that some "case management systems feature CRM tools as well, but those are in the most nascent of development stages."[27]   CRM tools allow solo practitioners and firms to track potential clients "from leads to conversions." Few practice management solutions have features such as Clio's campaign tracker, which provides firms with the ability to determine return on investment for their marketing campaigns.

6.2.2　Yet, an increasing number of solutions, including PracticePanther and Rocket Matter, do provide automated intake forms that can be embed directly onto the firm website. When a new form is submitted, a new contact and matter may be automatically created. For those with a desire or goal of growing their firms or practices, these CRM-like features may be important.

6.3   Communications features, including secure client portals and email, are important functions.

    6.3.1   Many of the practice management solutions provide a client portal as a means of communicating and sharing documents with clients. However, the ABA TechReport 2016 suggests that use of "secure client portals have not hit the mainstream."[28]

        6.3.1.1 ABA TechReport 2016 also notes that secure client portals, such as those available from practice management solution Clio and MyCase, although available, are not fully utilized. "Only 4.3% of respondents indicated that they use the Clio client portal (Clio Connect) and 3.7% for MyCase. If lawyers used the client portals to collaborate with clients, those secure messages would be directly tied to that client's matter(s) …"[29]

        6.3.1.2 As unencrypted email is increasingly recognized as inappropriate for confidential communications,[30] communicating via secure client portals is anticipated to be an area of growth. However, the perception that some clients may view having to sign in and check a client portal as inconvenient may be a factor in limiting the use of client portals.[31]

    6.3.2   While email functionality remains a factor in selection, concern regarding the availability of an email client with the service seems to be declining as an increasing number of solutions are integrating with Microsoft Office 365 (specifically Outlook) to allow synchronization of email into a matter within the practice management solutions

    6.3.3   Communicating by text has also become a hot topic as an increasing number of clients express interest or refuse to communicate in other formats. Zipwhip business-texting system enables landline texting via a business phone. Zipwhip integrates with Clio.

6.4   Perhaps one of the most effective features of an LPMS is the workflow feature. Workflow features allow the user to set up a number of tasks and apply the task list to any matter. Individual tasks included in the workflow may be calendared as well as delegated to other system users. For instance, if there are a number of tasks associated with opening a new matter, all of these tasks can be included in the workflow and applied to each new matter. As a result, it is not necessary to manually input each new task into every matter. Centerbase, has developed a robust workflow capability that is flexible.[32]

While initially only a few LPMS provided this feature, the feature is now available via a growing number of practice management solutions. Additionally, some practice management solutions are developing the ability to apply a workflow to many matters at one time using batch functioning.

6.5   Document storage is an essential feature for those firms desiring to go paperless, using digital client files. As such, almost all the LPMS options now provide a native document storage feature. However, some solutions limit the amount of storage or provide for the purchase of additional storage capacity. Most LPMS also allow integration with external file storage and sharing services such as Dropbox and Box.

Document management is a term of art referring to functionality such as versioning and document checkout. The advanced document management tools are very helpful, but not necessarily essential. Advanced document management functions, if necessary, can be incorporated into the LPMS through integration of document management service providers such as NetDocuments. Clio provides for just such an integration with NetDocuments.[33]

6.6   Several of the practice management solutions have exclusive agreements with legal research providers. For example, Clio integrates with Fastcase, CaseMaker integrates with CosmoLex, and Firm Central is a sister product of Westlaw. These integrations have advantages including the ability to store research results in the practice management solution. Firm Central displays legal authority cited in documents stored on the system with Keycite symbols and facilitates the ability to update the law cited in briefs, memorandums, and other documents stored in the practice management solution. Firm Central also provides a light version of a knowledge management tool at a cost that is affordable for solo and small firms not wanting the expense of the full West KM knowledge management tool.[34]

6.7   If, after review of your current applications and systems, you find that there are legacy or specialized applications you want to continue to use, despite the additional cost, then you will likely want to look at those practice management solutions with the widest opportunity for program integrations. Clio is recognized for its wide range of integrations. PracticePanther with its adoption of Zapier also allows significant integration.

6.8   Because time and billing are essential features for all users of practice management solutions, time and billing features are available universally. However, the level of detail and customization of these functions varies. Similarly, the accounting features of law practice management solutions differ significantly. Centerbase and Cosmolex are the two solutions that have perhaps the most developed accounting features.

6.8.1   Financial analytic reports are provided by many law practice solutions to help firms analyze issues such as most profitable case types and most effective income producing attorneys.

6.8.2   Fewer solutions, including LEAP, Rocket Matter, and some tiers of CLIO, provide the ability to set and monitor matter budgets.

7.   It is important to realize that selection of a practice management solution is not the end goal. Rather, firms and practitioners should work towards successful implementation to increase the efficiency of the firm to better serve clients.[35]

7.1   One recent article suggested using change management principles to help ensure successful implementation of technology purchases.[36]

7.2   Steps encompassing change management principles include: Get Buy-In Before Purchasing; Plan a Pilot Program, Roll Out, and Training; Identify Change Agents to Maintain Buy-In and Set the Tone; Make Policy Changes Where Needed; Create New Workflows; Provide Training; and Set Realistic Expectations.[37]

8.   There are numerous reasons attorneys and firms should adopt and use practice management solutions. Among these reasons is increased efficiency. This increased efficiency allows less time to be spent completing administrative responsibilities and more time to be spent on providing quality, billable legal services for clients. Other advantages of using a cloud-based LPMS include Increased mobility, avoidance of malpractice claims (based on calendaring and docketing errors or incomplete conflicts checking), and improved security and protection of confidential client information.[38] Additionally, a good process for getting all documents and notes scanned into the digital client file will mean no more wasted time looking for lost documents. Despite these advantages, attorneys are reluctant to select and implement this technology.

8.1   Attorneys may often cite multiple reasons for their reluctance to adopt practice management solutions regardless of the advantages associated with their use. The change in work processes is a concern. Change is difficult. Cost is given as a reason for reluctance. However, there is evidence that the return on investment resulting from use of these practice management tools would more than cover the cost.[39]

8.2   Lack of technical knowledge or understanding of the security concerns raised by cloud-based practice management solutions are also often cited reasons for failing to adopt a practice management solution. However, cloud-based practice management solutions actually reduce the need for technical knowledge and continuous IT support. Further, it is not difficult to establish security requirements that should currently be in place to protect client information in a cloud-based environment.[40] Additionally, most legal consumers can easily understand that the cloud-based law practice management solutions were designed with attorney-client privilege and confidentiality requirements in mind. As a result, these practice management solutions often provide greater security than could be attained via the use of on-premise servers/networks, particularly in a smaller firm without IT staff.

8.3   If a firm remains unmotivated to adopt a LPMS, individual staff and attorneys should plan and research and prepare to "make the jump" now. They have the opportunity to serve as the change leader who facilitate better service to clients through technology. They can increase the likelihood of being successful if they begin the process by considering the firm's goals and current system, setting a realistic budget, and researching and matching some system features with the goals. However, the process should not stop with simply researching about possible practice management solutions on vendor websites. Instead,

> Ask for a demo or even a free trial. Get hands on. Ask hard questions about the issues you've identified in your current workflow. And check in with your peers before you make the leap. It's likely someone in your professional network has tried the tools you're considering. Benefit from their experience. (And … consider the ABA TECHSHOW where you can get both the hands-on experience and the networking opportunity in one place.)[41]

8.4   And remember the bar association Practice Management Advisors, consultants, and other resources are available to help with the purchasing decision and the steps to successful implementation.

Endnotes

[1] Dan Pinnington and Ian Hu, Practice Management, ABA TECHREPORT 2017, https://www.americanbar.org/groups/law_practice/publications/techreport/2017/practice_management.html [https://web.archive.org/web/20180126145141/https://www.americanbar.org/groups/law_practice/publications/techreport/2017/practice_management.html].

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[4] Tom Lambotte, *Features Are Worthless: A Case for New Case Management Software*, GLOBALMACIT, http://www.globalmacit.com/features-are-worthless/?inf_contact_key=5505b3edc6fba10aab 3179151234b0ed64891daba7cb8b8ba2e4e42304cfdeab [https://web.archive.org/web/20170606032333/ http://www.globalmacit.com/features-are-worthless/?inf_contact_key=5505b3edc6fba10aab3179151234 b0ed64891daba7cb8b8ba2e4e42304cfdeab].

[5] *Id.*

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[7] Robert Ambrogi, *This Week In Legal Tech: 6 Questions To Ask Before Selecting A Practice Management System*, ABOVE THE LAW (JAN 23, 2017 AT 3:57 PM) http://abovethelaw.com/2017/01/this-week-in-legal-tech-6-questions-to-ask-before-selecting-a-practice-management-system/ [https://web.archive.org/web/20170606034845/http://abovethelaw.com/2017/01/this-week-in-legal-tech-6-questions-to-ask-before-selecting-a-practice-management-system/].

[8] *Id.*

[9] See Wells H. Anderson and JoAnn Hathaway, All-in-One Practice Management Applications, GPSOLO, Jul/Aug 2014, at 52-53, https://www.americanbar.org/publications/gp_solo/2014/july-august-2014/allinone_practice_management_applications.html [https://web.archive.org/ web/20170127223249/https://www.americanbar.org/publications/gp_solo/2014/july-august-2014/ allinone_practice_management_applications.html] for a discussion of traditional versus cloud applications. Sharon Nelson indicates that the decision between cloud or an on-premise alternative may be the first decision in selecting a practice management solution. Sharon Nelson, *Cloud or On-Premise?* in Tips for Choosing Practice Management Software, ATTORNEY@WORK BLOG (JUL 8, 2016), https://www.attorneyatwork.com/choosing-practice-management-software/ {https://web.archive.org/web/20170606021356/https://www.attorneyatwork.com/ choosing-practice-management-software/].

[10] Aaron Street, *supra* note 3.

[11] Robert Ambrogi, *This Week In Legal Tech: Practice Management Pricing Gets Murky,* ABOVE THE LAW, http://abovethelaw.com/2016/10/this-week-in-legal-tech-practice-management-pricing-gets-murky/ [https://web.archive.org/web/20170304041800/http://abovethelaw.com/2016/10/this-week-in-legal-tech-practice-management-pricing-gets-murky/].

[12] *Id.*

[13] Heidi Alexander, *Make a List* in Tips for Choosing Practice Management Software, ATTORNEY@WORK BLOG (JUL 8, 2016), https://www.attorneyatwork.com/choosing-practice-management-software/ [https://web.archive.org/web/20170606021356/https://www.attorneyatwork.com/choosing-practice-management-software/].

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[15] SoftwareAdvice, *Legal Software*, http://www.softwareadvice.com/legal/.

[16] Capterra, *Top Law Practice Management Software Products*, http://www.capterra.com/law-practice-management-software/.

[17] Capterra, Law Practice Management Top Features Guide, https://www.capterra.com/law-practice-management-software/features-guide.

[18] Cathy Reisenwitz, *Law Practice Management Software: 6 Popular Choices Compared*, CAPTERRA LEGAL SOFTWARE BLOG (Nov. 29, 2016), http://blog.capterra.com/law-practice-management-software-6-popular-choices-compared/ [https://web.archive.org/web/20170304190432/http://blog.capterra.com/law-practice-management-software-6-popular-choices-compared/].

[19] Feature Comparison Chart, LAWYERIST.COM, https://lawyerist.com/lawyerist/index.php?eddfile=176610%3A147931%3A1%3A0&ttl=1497572401&file=1&token=abe27936184b55d4962c79bd4f998f4f

[20] For example, CosmoLex indicates that they have a major release every 5-6 weeks. "In general, you can expect a major new release every 5-6 weeks. This has been our schedule for a long time as can be seen at: http://kb.cosmolex.com/support/solutions/folders/19000149075" Rick Kabra's Comments to Review of CosmoLex, LAWYERIST.COM (MAY 2, 2016 AT 5:58 AM) https://lawyerist.com/74270/cosmolex-law-practice-management-software/.

[21] "Practice management/ technology hotline service — OBA members may contact the Management Assistance Program (MAP) staff . . . for brief answers about practical management and technology issues, such as law office software, understanding computer jargon, staff and personnel problems, software training opportunities, time management and trust account management." Oklahoma Bar Association, *Member Perks: Benefits Your Association Provides*, http://www.okbar.org/members/Members/Benefits.aspx

[22] American Bar Association, Legal Technology Resource Center, *Practice/Case Management Software Comparison Chart for Solo/Small Firm* (Feb 2016) https://web.archive.org/web/20161012203336/http://www.americanbar.org/content/dam/aba/migrated/tech/ltrc/charts/pmtbchart.authcheckdam.pdf

[23] *Id.*

[24] Dennis Dimka, *Hosted vs. Web-based Legal Practice Management,* LAW TECHNOLOGY TODAY (JUL 23, 2015), http://www.lawtechnologytoday.org/2015/07/hosted-vs-web-based-legal-practice-management/ [https://web.archive.org/web/20150919144809/http://www.lawtechnologytoday.org/2015/07/hosted-vs-web-based-legal-practice-management/].

[25] *See, e.g.* Santa Barbara County Bar Association's membership benefits webpage, which specifically states, "Members should always use due diligence and exercise their own judgment regarding the use of any product or service provided by a third party. In no event shall SBCBA be responsible or liable, directly or indirectly, for any damage or loss caused or alleged to be caused by or in connection with the use of or reliance on any such content, goods, or services available on or through any third party site or resource." Santa Barbara County Bar Association, Membership Benefits, https://sblaw.org/membership-benefits/ [https://web.archive.org/web/20170608190359/https://sblaw.org/membership-benefits/].

[26] Joshua Poje, *Practice Management*, ABA TECHREPORT 2016, *supra* note 2.

[27] Jared Correia, *The Long Nine: Essential Software for the Modern Law Practice*, ATTORNEY@WORK BLOG (FEB. 2, 2016), https://www.attorneyatwork.com/long-nine-essential-software-modern-law-practice/ [https://web.archive.org/web/20160204110923/https://www.attorneyatwork.com/long-nine-essential-software-modern-law-practice/]

[28] Chad Burton, *Virtual Law Practice*, ABA TECHREPORT 2016, https://www.americanbar.org/publications/techreport/2016/virtual_law_practice.html [https://web.archive.org/web/20170609060644/https://www.americanbar.org/publications/techreport/2016/virtual_law_practice.html].

[29] *Id.*

[30] Jim Calloway, *Email Attachments vs Client Portals,* 87 Oklahoma Bar Journal 1707 (2016), http://www.okbar.org/members/MAP/MAPArticles/HotPracticeTips/EmailAttachments.aspx [https://web.archive.org/web/20170610165924/http://www.okbar.org/members/MAP/MAPArticles/HotPracticeTips/EmailAttachments.aspx] and Jim Calloway, *ABA Issues New Ethics Opinion on Encryption of Attorney-client Email*. JIM CALLOWAY'S LAW PRACTICE TIPS BLOG (MAY 11, 2017), http://www.lawpracticetipsblog.com/2017/05/2017-aba-ethics-opinion-email-encryption.html [https://web.archive.org/web/20170610164322/http://www.lawpracticetipsblog.com/2017/05/2017-aba-ethics-opinion-email-encryption.html].

[31] Chad Burton, *Virtual Law Practice*, *supra* note 28.

[32] Carol L. Schlein, *Avoid the Practice Management "Lite" Trap*, LAW OFFICE SYSTEMS BLOG (Sept. 27, 2017), http://www.losinc.com/corporate/2017/09/27/Billing/Avoid-the-Practice-Management-Lite-Trap_bl31898.htm and http://legal.centerbase.com/wp-content/uploads/2017/09/Avoid-Practice-Management-Lite-Trap.pdf [https://web.archive.org/web/20180126211737/http://legal.centerbase.com/wp-content/uploads/2017/09/Avoid-Practice-Management-Lite-Trap.pdf].

[33] Affinity Consulting Group, *Clio and NetDocuments Integration*, AFFINITY CONSULTING BLOG (JUN 2015), http://affinityconsulting.com/affinity-newsletters/413-feature-article-for-june-2015-clio-and-netdocuments-integration [https://web.archive.org/web/20170609164935/http://affinityconsulting.com/affinity-newsletters/413-feature-article-for-june-2015-clio-and-netdocuments-integration].

[34] See *e.g*. Jack Bostelman*, Leverage the Small Stuff*, KMJD CONSULTING (JAN, 05, 2014), (Explains how firms have identified matter completion through the knowledge management features and how that information has been used.)

[35] Ivy B. Grey, Why Better Technology Implementation Isn't About the Tech, (Jan 3, 2018 at 10:15 AM), https://abovethelaw.com/legal-innovation-center/2018/01/03/why-better-technology-implementation-isnt-about-the-tech/?rf=1 [https://web.archive.org/web/20180126220654/https://abovethelaw.com/legal-innovation-center/2018/01/03/why-better-technology-implementation-isnt-about-the-tech/?rf=1].

[36] *Id.*

[37] *Id.*

[38] Robert Ambrogi, *This Week in Legal Tech: 10 Reasons You Should Use Practice Management Software*, ABOVE THE LAW (OCT. 3, 2016 at 4:06 PM), http://abovethelaw.com/2016/10/this-week-in-legal-tech-10-reasons-you-should-use-practice-management-software/?rf=1 [https://web.archive.org/web/20170609114717/http://abovethelaw.com/2016/10/this-week-in-legal-tech-10-reasons-you-should-use-practice-management-software/?rf=1].

[39] *Id.*

[40] The reputation of the practice management solution provider is an important indicator of the likelihood that the vendor will appropriately handle security requirements. However, attorneys should look for the following technical assurances when selecting a practice management solution: 1) 2048-bit SSL Certificate and secure HTTPS connection when connecting to the service via a Web browser; 2) ISO 27001 and SOC 2 Type II certification; 3) AES 256-bit data encryption (which is equivalent to the encryption standards used by financial institutions); 4) inclusion of intrusion detection and virus protection software as part of the providers own servers; and 5) a separate uninterruptible power supply at the server facilities of the practice management solution vendor. Thomson Reuters, 5 Things Law Firms Need from a Legal Cloud Services Provider, http://legalsolutions.thomsonreuters.com/law-products/ns/news-views/small-law/legal-cloud-services.

[41] Joshua Poje, *Practice Management*, ABA TECHREPORT 2016, *supra* note 2.