Running a Small Law Office on Mac

Katie Floyd
Julie Tolek
WHO ARE WE?
WHY GO SOLO?
WHY GO SOLO?

FLEXIBILITY
LIFESTYLE
YOUR FIRM, YOUR RULES
PAY INCREASE
NICHE PRACTICE
INITIAL CONSIDERATIONS
ONGOING EXPENSES
Retirement Fund
Think Pink Law

Think Pink Law
We do law. Differently.

Ready for a human lawyer who does things differently?

Pick me for your team now!

Julie Tolek, Esq., Founder

If you're looking for a cool lawyer who will talk to you like a human, help you to make decisions and get through the BS, then I'm the lady for you.
OUR PHILOSOPHY
HARDWARE

TOOLS WE USE
HARDWARE

MAC MINI

- The Mac I already had
- Easy to pair with accessories you already own
- Plenty of processing power for office tasks
- If buying new, consider a portable or mid-range iMac
- Segregate your work and personal files
HARDWARE

BACKUP HARD DRIVE

- For local backups
- Prefer 2.5” USB powered drives - less fun and easy to grab and go
- Make sure you encrypt your external drive in the event of loss or theft
**LASER PRINTER**

- Cheaper than an ink jet for day-to-day use
- Consider printing your own letterhead rather than buying custom stock
- Make sure you can print envelopes
- Amazon dash enabled is a bonus
DOCUMENT SCANNER

- ScanSnap iX500
- Essential for a paperless practice
- Go paperless from the start - much easier than converting a paper practice later
HARDWARE

BATTERY BACKUP

› Save your work from unexpected power outages

› Protects your equipment from surges and sudden shutdowns.

› Don’t take a chance - just buy one, they’re inexpensive.
DYMO TWIN TURBO LABEL PRINTER

- Prints labels and postage
- Use with Endicia’s’ free print service for DYMO printers to print basic postage
- Can be used with stamps.com and other services as well
HARDWARE

TRIPOD/GORILLA POD

- Flexible
- Compact
- Inexpensive
HARDWARE

OTHER APPLE STUFF

- iPhone
- iPad
- MacBook
- MacBook Pro
RUBY RECEPTIONISTS

- 100% Live Call Answering
- Less expensive (and more reliable) than an employee.
- Solos can use the Ruby App and their cell phone
- Starts at $250 per month for 100 receptionist minutes
- No contract, month-to-month service
- Save $75: www.callruby.com/katiefloyd
Connect to your Calendar and allow people to schedule with you

Use through email or on your website

Different events have different rules relating to availability, buffer time, questions and instructions.

Each event has custom email notifications with information tailored to the event

$10/month or $96 a year
TEXTEXPANDER

- Insert snippets of text as you type using a quick search or abbreviation.
- Use for email replies, simple correspondence or boilerplate provisions
- Highly customizable, saves hours of typing
- $40/yr
A Better way to schedule with groups

Eliminate dozens of emails

Pick possible dates and times for your meeting

Send a link to your attendees

They respond with their availability

Pick a time and go.
Free version will check for critical grammar and spelling mistakes

Premium version has more advanced features

Integrates with Microsoft Office (Windows only)

Premium version $140/yr
Stay safe on public Wi-Fi with a VPN

A Virtual Private Network is a tool to encrypt traffic sent over a public networks

Works with Windows, Mac, iOS and Android

Weekly, Monthly, or Yearly passes

Can be configured to automatically secure connections
WWW.ZOOM.US

ZOOM

- Video conferencing
- Free Version Available
- Screen sharing
- Works with Windows, Mac, iOS and Android
- Pro upgrade with your own Zoom Room
- Ability to record conferences
TOOLS WE USE
A web presence for your firm is a must!

Highly customizable template-based system

Hosting and maintenance is included.

Plans start at $12/month
G SUITE

- Formerly Apps for Business
- $5 per user per month
- Email, Contacts, and Calendars
WORDPRESS/GODADDY

- Website/blog
- Design with Wordpress themes
- Buy your domain and host on Godaddy
- SEO friendly
Print business cards, brochures, other marketing materials
PRACTICE MANAGEMENT

TOOLS WE USE
HAZEL

- Watches folders and automatically organizes files
- Can move and rename folders based on custom rules you create
- Create custom workflows to process your files
LEXICATA

- CRM
- Intake
- Email forms to clients to fill out
- Document Automation and E-signature using HelloSign
- Create templates
- Schedule reminders for clients
- Track leads
- Sync with Clio
PRACTICE MANAGEMENT

CLIO

- Time Tracking
- Billing
- Calendar and To-Do Lists
- Client Portal
- Trust Accounting
- App available for iOS and Android
- Exceptional customer service
- Syncs with numerous other apps
FINANCE

TOOLS WE USE
QUICKBOOKS ONLINE

- Suggested by my accountant
- Links with bank accounts to import transactions
- Accountant audits data quarterly
- Uses information to create tax returns
- Katie uses only the most basic package and features
HARVEST

- Track time and expenses and generate custom invoices
- Integrates with Quickbooks Online
- All billing is handled electronically (no paper!)
- Clients can pay online through various payment integrations
- Keep track of invoices and payment status
LAWPAY

- Credit Card Processor
- Allows you to maintain trust account compliance
- Accept payments in the office or online

WWW.LAWPAY.COM
Accept Credit Card Payments

Securely store credit card info for billing

PCI Compliant

Dashboard view of all clients

Easily view transactions and run reports for tax prep
TOOLS WE USE
DROPBOX PLUS

- 1TB of online storage
- Easy to share and store files
- Remote device wipe
- Two factor authentication
Runs in the background and automatically backs up your documents and data.

Online backups protect your data from local events like theft, power surge, or disaster.

You can restore an individual file or an entire directory. For large restores, they’ll ship you a hard drive.

You can choose to encrypt your data with your own key.

$5/month or $50/year per computer.
CARBON COPY CLONER

- Automatically run local “clone” backups for quick restore
- Create a bootable backup
- Updates only those items that have changed
- Highly flexible, regularly updated
• YOU play the most important part in keeping TECHSHOW exciting. *Please complete the Speaker evaluation before you leave.*

• Reserve the dates!

TECHSHOW 2019: February 27 - March 2, 2019