



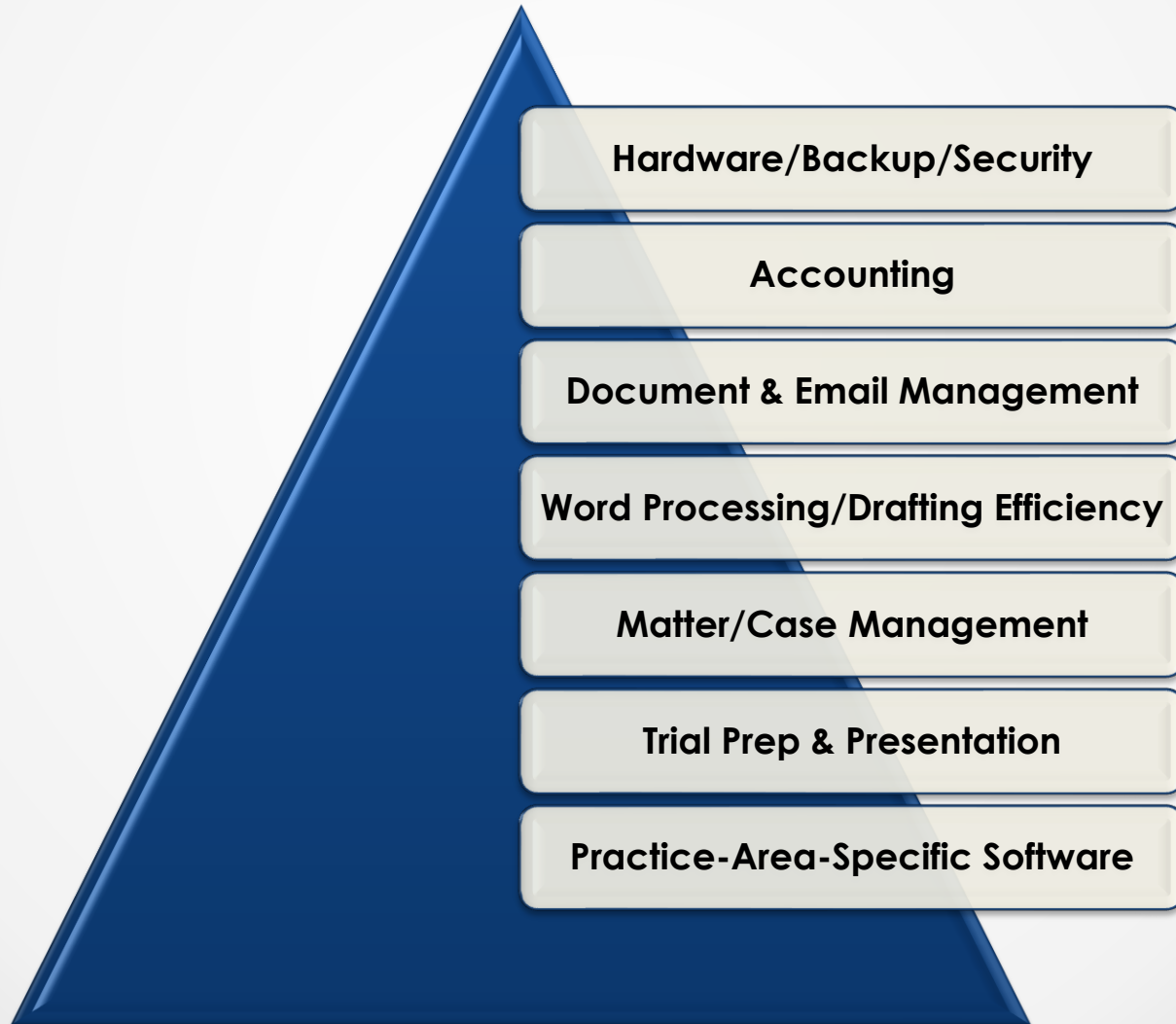
EXPERIENCED. CREATIVE. CONNECTED.

# Starting a Firm: What You Need to Know

**Presented By: Steven J. Best, Esq.**  
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SMART BUSINESS STRATEGIES FOR THE LEGAL WORLD.

# Hierarchy of Needs



# #1 - Hardware

- ▶ Laptops, desktops & tablets
- ▶ Servers & storage
- ▶ Printing
- ▶ Security
- ▶ Backup & disaster avoidance
- ▶ Remote access & practice portability
- ▶ Technical support
- ▶ Phones



# #2 - Accounting

- ▶ **Accounting software**
- ▶ **Billing, AP, AR, GL**
- ▶ **Reporting**
- ▶ **Trust accounting**
- ▶ **Operating account management**
- ▶ **Credit card processing**



# #3 – Document & Email Management

- ▶ **Paper reduction**
- ▶ **Remote access to data & documents**
- ▶ **Scanners, copiers & multifunctions**



# #4 – Drafting Efficiency

- ▶ **Word processor used as a glorified typewriter**
- ▶ **Standard method has high margin for error**
- ▶ **Faster, more accurate drafting = higher profit**



# #5 – Matter/Case Management

**When these applications make sense:**

- ▶ **High volume of cases**
- ▶ **Lots of deadlines**
- ▶ **Need better internal communication**
- ▶ **Need better coordination among users**
- ▶ **Need better organization**

# #6 – Trial Prep & Presentation

**Importance depends upon practice area**

- ▶ **Case Logistix**
- ▶ **Condordance**
- ▶ **Edge**
- ▶ **Lexbe**
- ▶ **MasterFile**
- ▶ **Nextpoint**
- ▶ **CT Summation iBlaze**

# #7 – Practice Area Specific Software

For example:

- ▶ **Bankruptcy**
- ▶ **Estate planning**
- ▶ **Family law**



**FinPlan**  
**Divorce Planner**

The logo for FinPlan Divorce Planner features the text "FinPlan" in a bold, orange sans-serif font, with "Divorce Planner" in a bold, dark blue sans-serif font directly below it.

# Building The



## New Firm Budget

### Startup Costs + First Year Costs

| Description  | Quantity | Unit Price | Subtotals         | Grand Totals      |
|--|----------|------------|-------------------|-------------------|
| <b>Computers</b>   |          |            |                   |                   |
| <b>Notebook:</b> Dell Latitude 15 5000 notebook computers - includes dual 23" monitors, docking station, 3 yr/next business day/on-site warranty and 3 yr accidental damage protection, DVD/RW, webcam, backlit keyboard, wireless keyboard and mouse, fingerprint reader for security, Bluetooth, Microsoft Office 2013 and Adobe Acrobat XI. | 1        | \$2,352.00 | \$2,352.00        |                   |
| <b>Keyboard/Mouse:</b> Logitech MK710 Wireless Desktop Mouse and Keyboard Combo. This is an external keyboard/mouse combination for use with the docking stations.   | 1        | \$75.00    | \$75.00           |                   |
| <b>PC Setup:</b>   | 1        | \$300.00   | \$300.00          |                   |
| <b>Computers Total:</b>  |          |            | <b>\$2,727.00</b> | <b>\$2,727.00</b> |
| <b>Office Phone System with www.RingCentral.com</b>  |          |            |                   |                   |
| <b>Phones:</b> Polycom VVX 310 phones from www.RingCentral.com   | 1        | \$169.00   | \$169.00          |                   |
| <b>Startup Costs:</b> Shipping   | 1        | \$18.95    | \$18.95           |                   |
| <b>Monthly Fee - Service:</b> \$34.99/month (you can get a discount if you pay for the entire year at once but I figured monthly was easier)   | 12       | \$34.99    | \$419.88          |                   |
| <b>Office Phone System Total:</b>  |          |            | <b>\$607.83</b>   | <b>\$607.83</b>   |
| <b>Clio Cloud Based Case Management &amp; Billing</b>  |          |            |                   |                   |
| <b>Clio Annual Fee:</b> \$65 per user per month if paid at once; \$72 per month if paid monthly  | 1        | \$780.00   | \$780.00          |                   |
| <b>Services:</b> Kick Off Meeting  | 1        | \$175.00   | \$175.00          |                   |

# The Checklist



# Hardware

- ☐ **Computer**
- ☐ **Monitor(s)**
- ☐ **Tablets (iOS or Android)**
- ☐ **Servers (do you need one?)**
- ☐ **Network cables**
- ☐ **Network patch cables**



# Hardware

- ☐ **Office phone system**  
(VoIP or traditional; hosted or in-house?)
- ☐ **Printer or multifunction**  
(laser or inkjet, B&W or color, duplex, wireless, paper trays?)
- ☐ **Toner or Ink**



# Hardware

- ☐ Scanner
- ☐ Surge suppressors
- ☐ Switch/hardware firewall
- ☐ Uninterruptible power supply
- ☐ USB printer cable



# Software

- ☐ Accounting and billing
- ☐ PDF creation/manipulation
- ☐ Case management software
- ☐ Microsoft Office or
- ☐ Search software
- ☐ Speech recognition software



# Security

- ☐ Antispam software or service
- ☐ Antispyware software
- ☐ Antivirus software
- ☐ Computer backup system
- ☐ Backup Software
- ☐ Software firewall



# Services

- ☐ Cell phone
- ☐ Electronic version of your letterhead
- ☐ Hosted Microsoft Exchange
- ☐ Internet fax service
- ☐ Logo, letterhead & business card design



# Services

- ☐ Online backup service
- ☐ Remote Access
- ☐ Reserve a domain name
- ☐ Web Meeting Service
- ☐ Website



# Other Stuff

- ❑ High speed Internet
- ❑ Training for Whatever You Buy



# Non-Tech Stuff

- ☐ Office supplies & paper
- ☐ Insurance (health, malpractice, etc.)
- ☐ Office space
- ☐ Business plan
- ☐ Marketing plan
- ☐ Human resources

# Foundational Hardware



# Portable Computers

**Lawyers need ultrabooks, notebooks or laptops**

- ▶ **Prices VERY close**
- ▶ **Work anywhere**
- ▶ **Docking station makes it a desktop**
- ▶ **Take your files with you**
- ▶ **Anywhere access**



# Appropriate Notebook Category

- ▶ **Home Users: Cutting edge, less durable**
- ▶ **Abusers: Impervious to sand, dust & liquid**
- ▶ **Gamers: Ultra-high performance, heavy, terrible battery life**
- ▶ **Business: Superior warranty, durable**

# Ultrabook

- ▶ Resume from hibernation < 3 seconds
- ▶ Battery life > 6 hours of video
- ▶ USB 3.0
- ▶ < 0.83" thick
- ▶ < 3 lbs.
- ▶ Powerful
- ▶ Touch
- ▶ Antivirus
- ▶ Anti-theft



Lenovo  
ThinkPad X1  
Carbon, i7, 8  
GB RAM, 256  
GB SSD - \$1,700

# 2 in 1 Convertible

## Hybrid tablet/laptop



# Tablet



# Building the Right Configuration

**Click here to  
Configure**



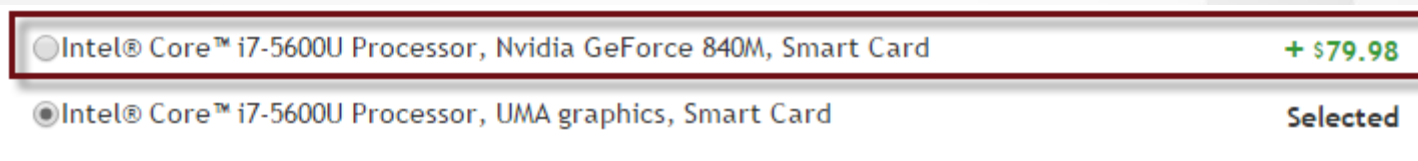
# Graphics or Display Adapter

- ▶ **Processes images**
- ▶ **Two kinds:**
  - ▶ **Integrated or UMA (unified memory architecture)**
  - ▶ **Discrete**



# Graphics or Display Adapter


- ▶ Discrete more powerful and preferred if:
  - ▶ Use large external monitor
  - ▶ Connect to 2 or more monitors
  - ▶ Video editing
  - ▶ Play games
  - ▶ Heavy graphics applications like CAD



- ▶ You may have no choice but integrated

# Memory or RAM

8 GB enough for most users; but more is better

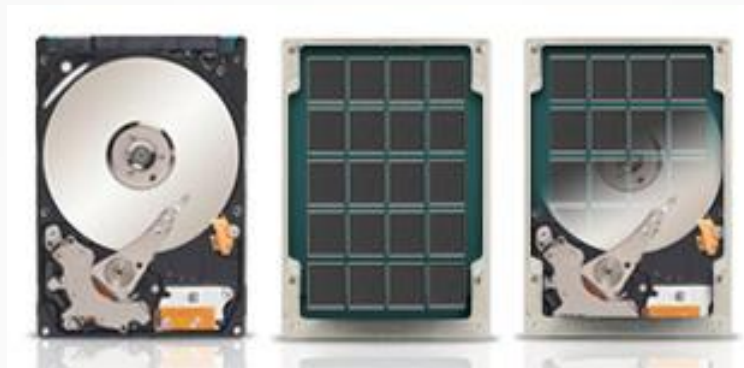
 **Memory**

|   |            |
|---|------------|
| <input checked="" type="radio"/> 4GB (1x4GB) 1600MHz DDR3L Memory | Selected   |
| <input type="radio"/> 8GB (2x4GB) 1600MHz DDR3L Memory            | + \$58.90  |
| <input type="radio"/> 8GB (1x8GB) 1600MHz DDR3L Memory            | + \$58.90  |
| <input type="radio"/> 16GB (2x8GB) 1600MHz DDR3L Memory           | + \$195.30 |

# Hard Drive – Permanent Storage

## 3 types

- ▶ **Mechanical (HDD)** – fast – spinning metal platters
- ▶ **Hybrid (SSHD)** – faster – HDD + small SSD
- ▶ **Solid State (SSD)** – fastest – flash memory chips



# Hard Drive – Permanent Storage

- ▶ **Mechanical drive speeds**

- ▶ 5,400 rpm
- ▶ 7,200 rpm
- ▶ 10,000 rpm

- ▶ **Look for 7,200  
and NOT 5,400**



# Hard Drive – Permanent Storage

## SSD is recommended

- ▶ **Faster**
- ▶ **Less electricity/battery**
- ▶ **Less likely to crash**
- ▶ **No moving parts**
- ▶ **Less heat**

| Hard Drive   |                 |
|--|-----------------|
| <input type="radio"/> 500GB Hybrid Hard Drive  | (\$167.40)      |
| <input type="radio"/> 128GB Solid State Drive Mini card                                | (\$93.00)       |
| <input checked="" type="radio"/> 256GB Solid State Drive Mini card                     | <b>Selected</b> |
| <input type="radio"/> 256GB Self Encrypted Solid State Drive Mini card, Opal Compliant | + \$62.00       |
| <input type="radio"/> 80GB Solid State Drive Mini card                                 | (\$136.40)      |
| <input type="radio"/> 500GB 5400RPM Hard Drive   | (\$186.00)      |
| <input type="radio"/> 512GB Solid State Drive Mini card                                | + \$198.40      |
| <input type="radio"/> 180GB Solid State Drive Mini card                                | (\$49.60)       |
| <input type="radio"/> 512GB SED Opal 2 Solid State Drive                               | + \$193.97      |

# Screen

- ▶ **Screen size – 11, 13, 14, 15, 15.6**
- ▶ **Resolution & touch – look for HD (1080)**

# Warranty Options

- ▶ **System Warranty**
  - ▶ 3 year, next business day, on-site
  - ▶ 24x7 phone technical support
  - ▶ Consider extending to 4 or 5 years
- ▶ **Warranties are better & cheaper to buy from manufacturer than a retailer**

# Warranty Options

- ▶ **Technical Support**
  - ▶ **24x7**
  - ▶ **North American based – English as a first language**
- ▶ **Accidental Damage Protection – worth it**

# Warranty Options

## Hardware Support Services

Using ProSupport Plus with SupportAssist can reduce time on the phone with tech support by up to 84% as compared to HP and Lenovo!  
 \* Based on Nov 2014 Principled Technologies Test Report commissioned by Dell. Actual results will vary.  
[Click here for full report.](#) Some ProSupport Plus features are not available on all products.

 [Help Me Choose](#)

### Upgrade to the most complete support service with ProSupport Plus!

- Hardware support during local business hours
- 24x7 hardware and software phone support
- Proactive and predictive automated support
- Repair accidentally damaged devices and keep hard drive after replacement

| Basic | ProSupport | ProSupport Plus |
|-------|------------|-----------------|
| ✓     | ✓          | ✓               |
| —     | —          | —               |
| —     | —          | —               |
| —     | —          | ✓               |

### Basic Service

- ☒ 3 Year Hardware Service with In-Home/Onsite Service After Remote Diagnosis **Selected**
- ☐ 4 Year Hardware Service with In-Home/Onsite Service After Remote Diagnosis **+ \$73.78**
- ☐ 5 Year Hardware Service with In-Home/Onsite Service After Remote Diagnosis **+ \$135.78**

### ProSupport

- ☐ 3 Year ProSupport with Next Business Day Onsite Service **+ \$61.38**
- ☐ 4 Year ProSupport with Next Business Day Onsite Service **+ \$141.98**
- ☐ 5 Year ProSupport with Next Business Day Onsite Service **+ \$210.18**

### ProSupport Plus

- ☐ 1 Year ProSupport Plus with Next Business Day Onsite Service **(\$54.56)**
- ☐ 2 Year ProSupport Plus with Next Business Day Onsite Service **+ \$26.66**

- ☒ **Dell Recommended** **+ \$132.06**
- ☐ 3 Year ProSupport Plus with Next Business Day Onsite Service

- ☐ 4 Year ProSupport Plus with Next Business Day Onsite Service **+ \$231.88**
- ☐ 5 Year ProSupport Plus with Next Business Day Onsite Service **+ \$313.72**

# Security Software

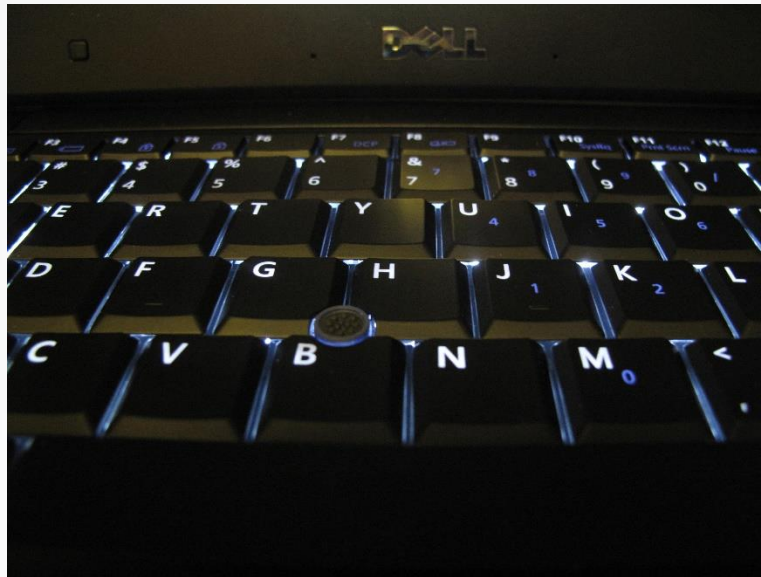
- ▶ You need this
- ▶ Mac has none; Windows included software is suspect
- ▶ Typical suspects: Kaspersky, McAfee, Bitdefender, Norton, Panda

# Office Suite

- ▶ **Usually cheaper to buy with PC**
- ▶ **WP never an option to include with PC**
- ▶ **Office 365 is compelling**

# Keyboard

- ▶ **Worth testing at a computer store**
- ▶ **I like backlit keyboards**



# Battery

- ▶ **You're stuck with batteries offered for your notebook model**
- ▶ **Bigger = longer life but heavier**
- ▶ **Look for notebooks that allow you to swap batteries so you can bring an extra (no Apple products allow this)**

# Fingerprint Reader

- ▶ **Extra security & easy logon**
- ▶ **Many include it standard**



# Webcam & Built In Mic

Very important to include



# Optical Drive/DVD

- ▶ **Smaller & lighter = no drive**
- ▶ **External USB 3.0 external drive = \$35**



# Upgrades



# Docking Station

► **This:**



► **Not This (unless it's thunderbolt 3):**



# Docking Station



This is the high-speed port that connects to the under-side of the laptop



# Other Upgrades

- ▶ **Bigger or extra battery**
- ▶ **Dual 23" monitors**



# Other Upgrades

## 3M Computer Privacy Screens

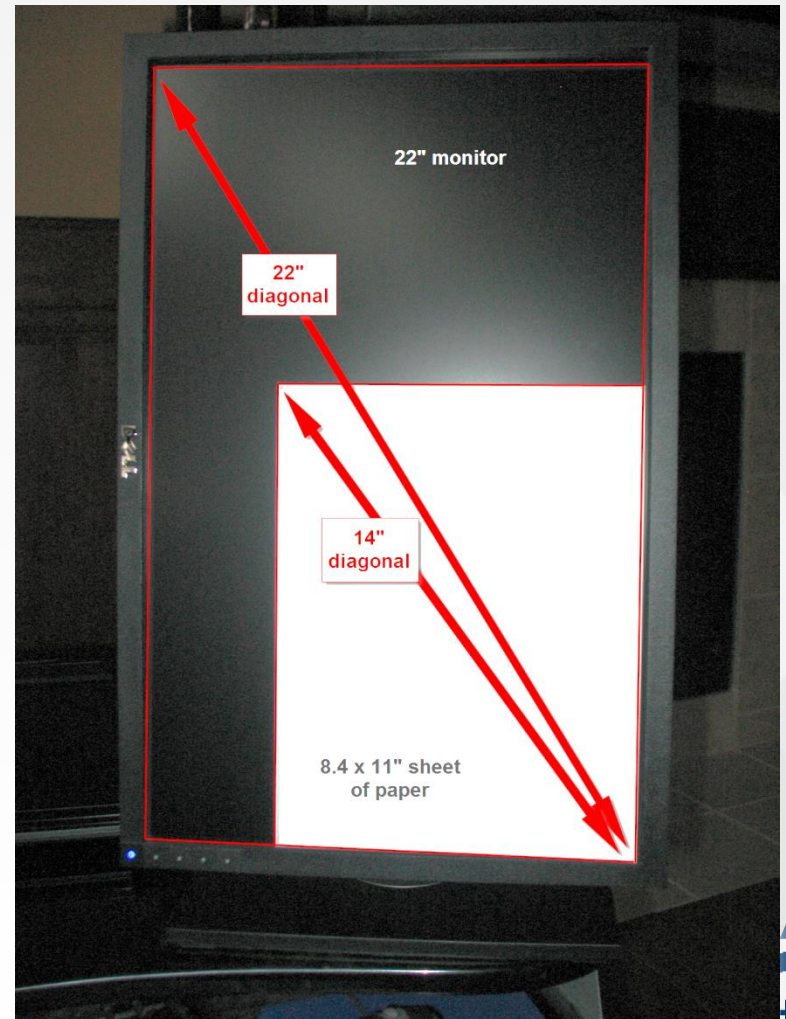


# Power Sources

## Monster Outlets To Go Powerstrip - \$10



# Buy Monitors That Rotate



# When Do You Need A Server?



# What Is a Server?

**High powered computer with high reliability**

- ▶ **Special processors (Xeon & Itanium)**
- ▶ **Dual processors**
- ▶ **Redundant hard drives & power supplies**
- ▶ **Hot swappable components**
- ▶ **Scalability**
- ▶ **Faster data processing**

# Server Benefits

- ▶ **File and Network security**
- ▶ **Increased reliability**
- ▶ **Remote access to programs and data**
- ▶ **Centralized data storage**
- ▶ **Antivirus/malware management**
- ▶ **Centralized backup**

# So When Do You Need One?

- ▶ **Most benefits can be achieved without buying one**
- ▶ **A program may require one but that's the only compelling reason**
- ▶ **“I suppose it is tempting, if the only tool you have is a hammer, to treat everything as if it were a nail.”**  
– Abraham Maslow

# Backup



# **Top Five Tips For Preventing Unthinkable Disasters From Crippling Your Small Law Firm**

## **Tips (see Exhibit C)**

- ▶ **Go paperless (or less paper)**
- ▶ **Sever Your Servers With Hosted Communications**
- ▶ **Centralized Document and Practice Management**
- ▶ **Laptops Over Desktops Plus Smartphones and iPads**
- ▶ **Home Office Essentials (laptop, VoIP phones, headset with a microphone, a printer, and a scanner)**

# Personal Backup Recommendation

- ▶ **Carbonite Personal Plus**
  - ▶ Unlimited storage
  - ▶ File backup to cloud
  - ▶ Mirror to external drive
  - ▶ Versions
  - ▶ \$99/year
- ▶ **WD My Book 3 TB USB 3.0**  
**\$110**

**TOP SELLER**

Plus  
**\$99<sup>99</sup>**  
per year/per computer

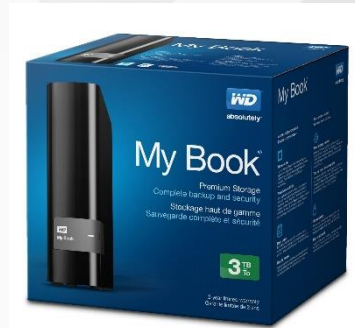
**UNLIMITED CLOUD STORAGE SPACE**  
for a home office or family computer\*

WINDOWS

---

**INCLUDES:**

- ✓ Automatic cloud backup
- ✓ Sync, share and access files remotely with free apps
- ✓ U.S.-based **Phone**, Email & Chat support, 7 days a week
- ✓ External hard-drive backup
- ✓ Mirror Image backup ?



# Cloud Computing



# Definitions

## Flavors of Cloud

- ▶ **Software as a Service (“SaaS”)**
- ▶ **Infrastructure as a Service (“IaaS”)**

**Unless you've got a huge budget,**



Cloud

# Print – Scan - Fax



# Centralize Printing



# De-Centralize Scanning



**Repeat after me:  
I do not need a copier!**



# Recommended Sheetfed Scanners

- ▶ **Fujitsu ScanSnap iX500**  
(25/50 ppm - \$415)  
Best price = [www.amazon.com](http://www.amazon.com)



- ▶ **Fujitsu fi-7160** (60/120 ppm - \$875)



# Recommended Portable Scanners

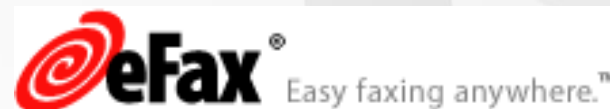
▶ **Fujitsu ScanSnap S1300**  
(8/16 ppm - \$261)

▶ **Fujitsu ScanSnap iX100**  
(really slow - \$230)



# Fax Recommendations

- ▶ Multifunction
- ▶ Internet faxing
  - ▶ [www.myfax.com](http://www.myfax.com)
  - ▶ [www.ringcentral.com](http://www.ringcentral.com)
  - ▶ [www.efax.com](http://www.efax.com)
  - ▶ [www.greenfax.com](http://www.greenfax.com)
  - ▶ [www.onebox.com](http://www.onebox.com)
  - ▶ [www.faxzero.com](http://www.faxzero.com)



# PDF Software

- ▶ **Acrobat DC Pro (rent \$180/yr or \$449)**
- ▶ **Acrobat DC Stnd (rent \$156/yr or \$299)**
- ▶ **Foxit PhantomPDF Business (\$129)**
- ▶ **Nuance Power PDF (\$150)**
- ▶ **Nitro PDF Professional (\$159)**

# Document Management



**Avoid paper files**



**Get a search utility**



# Billing & Accounting Software



# Your Accounting Goal

**Compress the accounting function into as little time as possible per month**



Accounting made **easy** reliable  
efficient secure  
quick

# Important Tips

- ▶ **Billing is only one aspect of accounting**
  - ▶ **Accounts payable & accounts receivable**
  - ▶ **General ledger**
  - ▶ **Trust accounting**
  - ▶ **Operating account**
  - ▶ **Management & financial reporting**

- ▶ **Don't use two programs**

Timeslips®

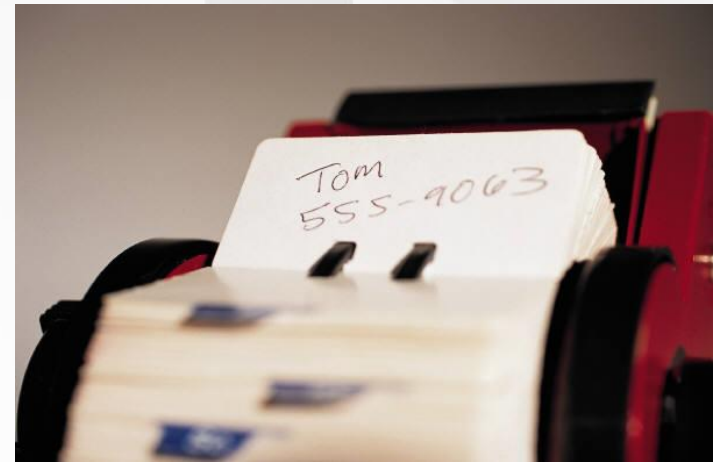
 **intuit**  
QuickBooks®

# QuickBooks

- ▶ **Not designed for professional services**
- ▶ **Just because it's the only program your accountant knows doesn't mean it's right for you**
- ▶ **Better choices available**

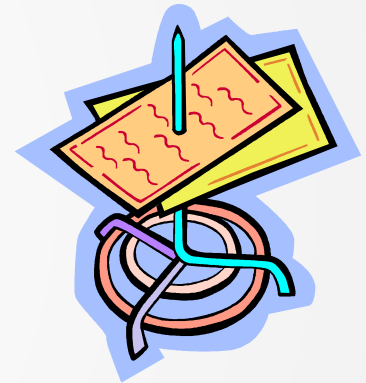
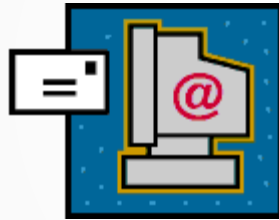
# Case Management Software

It takes your calendar, your task list,  
and your contact list...



# Case Management Software

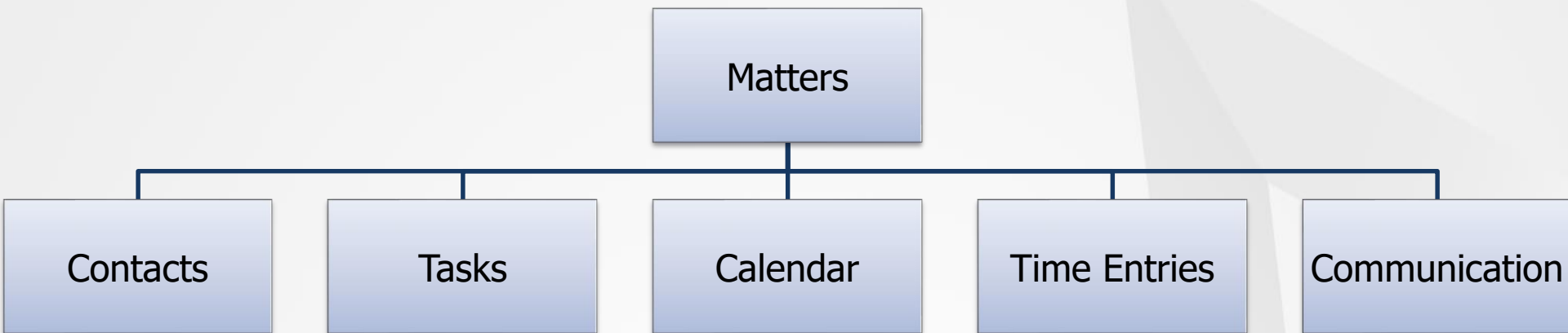
...adds other critical practice information like...



## Communication and Time Entries

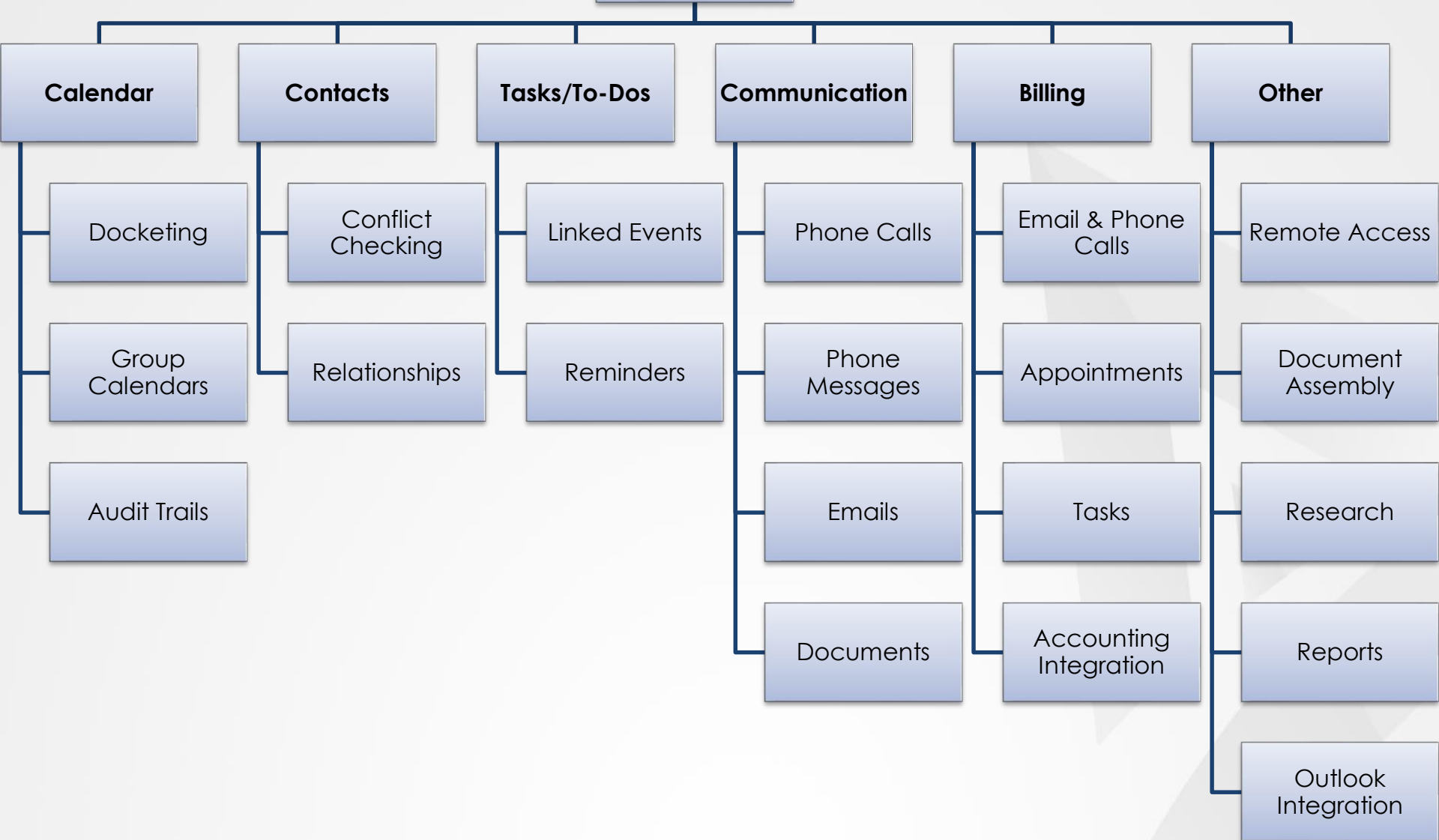
# Case Management Software

... and organizes it all by matter



It works the way you work, it thinks the way you think.  
Then, it brings in many other elements to help manage  
your practice...

# Matters



# Marketing Your Firm

SEO | LAW FIRM

• Legal Marketing •

# Logo, Letterhead & Business Cards

- ▶ Hire a design professional
- ▶ Use the web
  - ▶ [www.logocontest.com](http://www.logocontest.com)
  - ▶ <http://99designs.com/logo-business-card-design>
  - ▶ <http://www.designcontest.com/logo-design/>
  - ▶ <http://logotournament.com/>

# Reserve Domain Name

- ▶ About \$15/year
- ▶ Options
  - ▶ [www.godaddy.com](http://www.godaddy.com)
  - ▶ [www.networksolutions.com](http://www.networksolutions.com)
  - ▶ [www.1and1.com](http://www.1and1.com)



# Reserve Domain Name

- ▶ ***How to Register Your Own Domain Name by Michael King of PCWorld.com***  
(<http://tinyurl.com/cqb4r2o>)
- ▶ **Website = your virtual business card**



# QUESTIONS?

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**Social Media:**

