



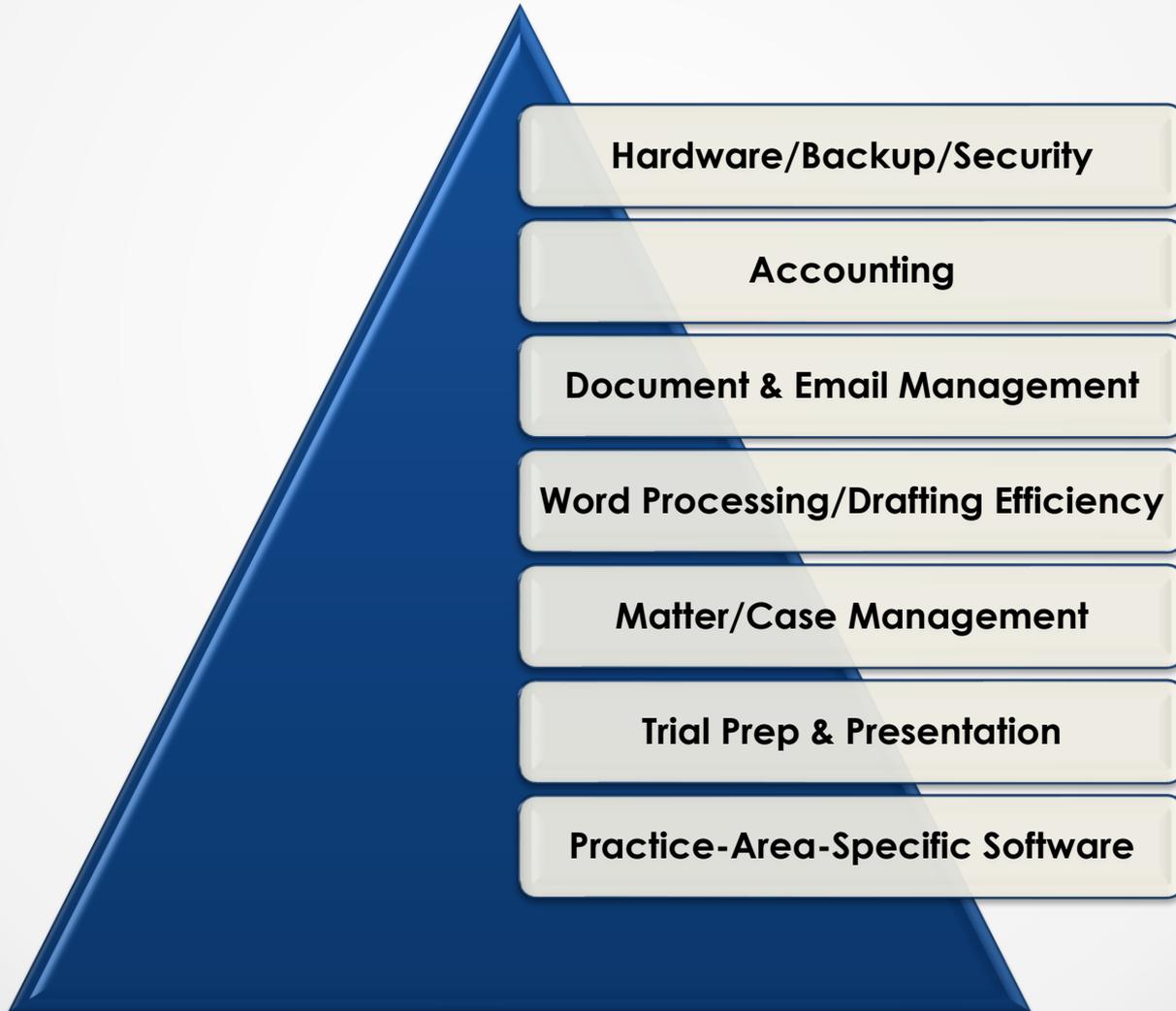
EXPERIENCED. CREATIVE. CONNECTED.

# Starting a Firm: What You Need to Know

Presented By: Steven J. Best, Esq.  
[sbest@affinityconsulting.com](mailto:sbest@affinityconsulting.com)

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**

# 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

<input type="radio"/> Intel® Core™ i7-5600U Processor, Nvidia GeForce 840M, Smart Card	+ \$79.98
<input checked="" type="radio"/> Intel® Core™ i7-5600U Processor, UMA graphics, Smart Card	Selected

- ▶ 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
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 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

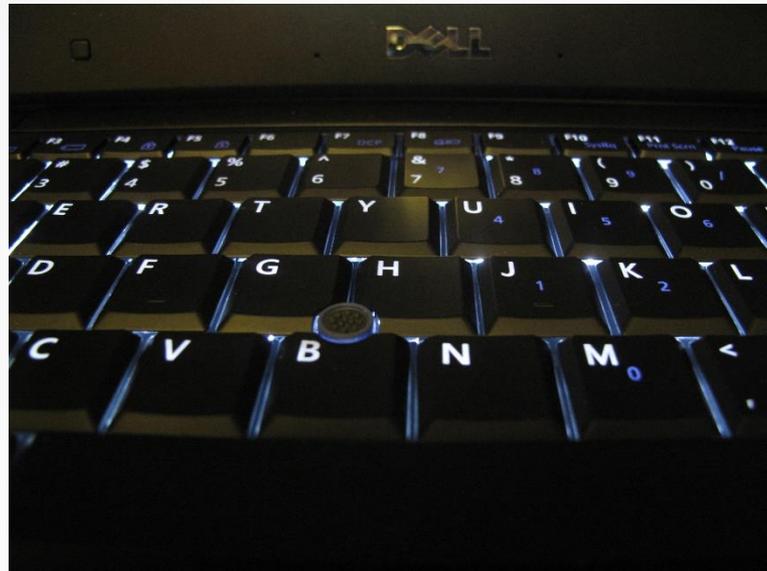
- ▶ You need this
- ▶ Mac has none; Windows included software is suspect
- ▶ Typical suspects: Kaspersky, McAfee, Bitdefender, Norton, Panda

# 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

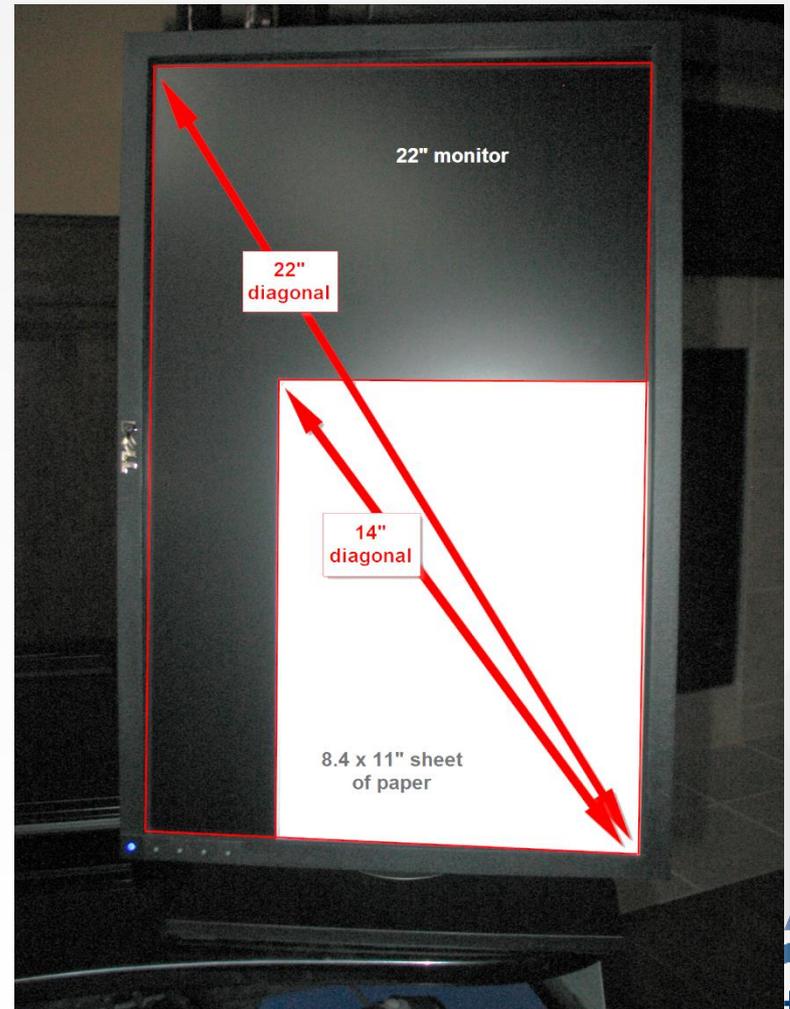


# Power Sources

## 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

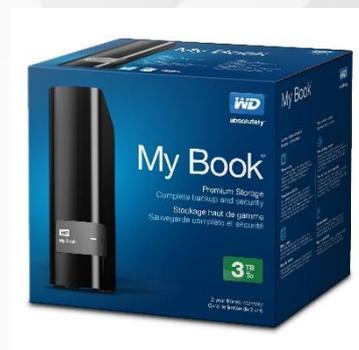
**UNLIMITED CLOUD STORAGE SPACE**  
for a home office or family computer\*

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

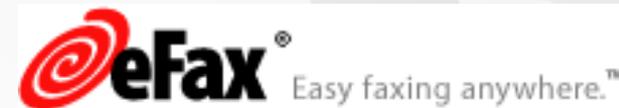
▶ **Fujitsu ScanSnap S1300**  
(8/16 ppm - \$261)

▶ **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**

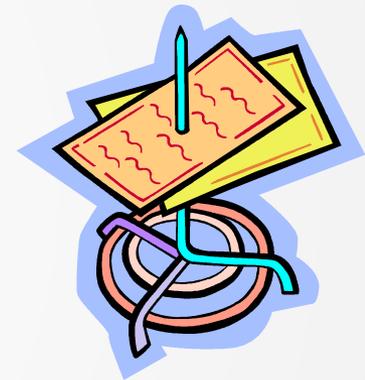
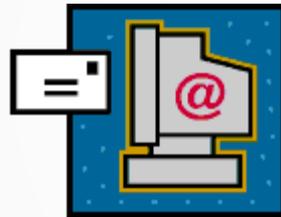
# Case Management Software

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



# Case Management Software

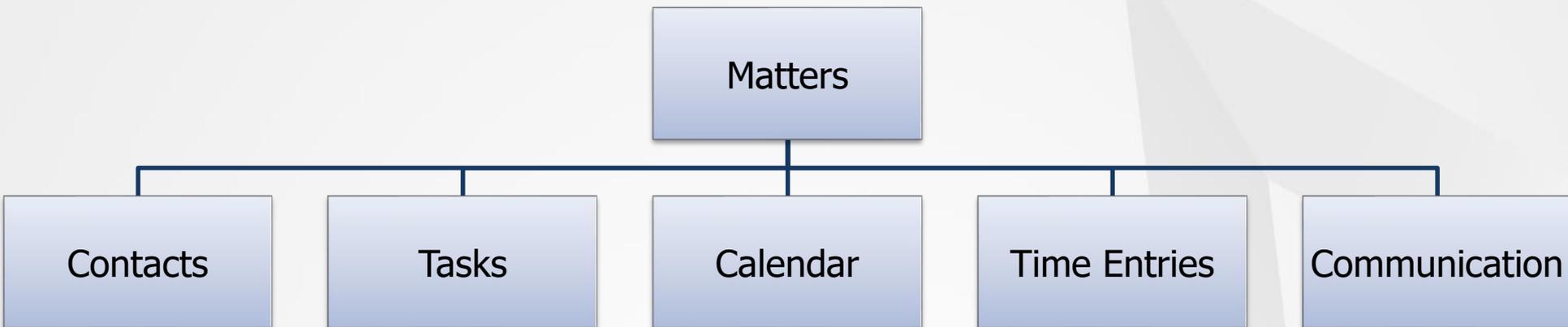
...adds other critical practice information like...



**Communication and Time Entries**

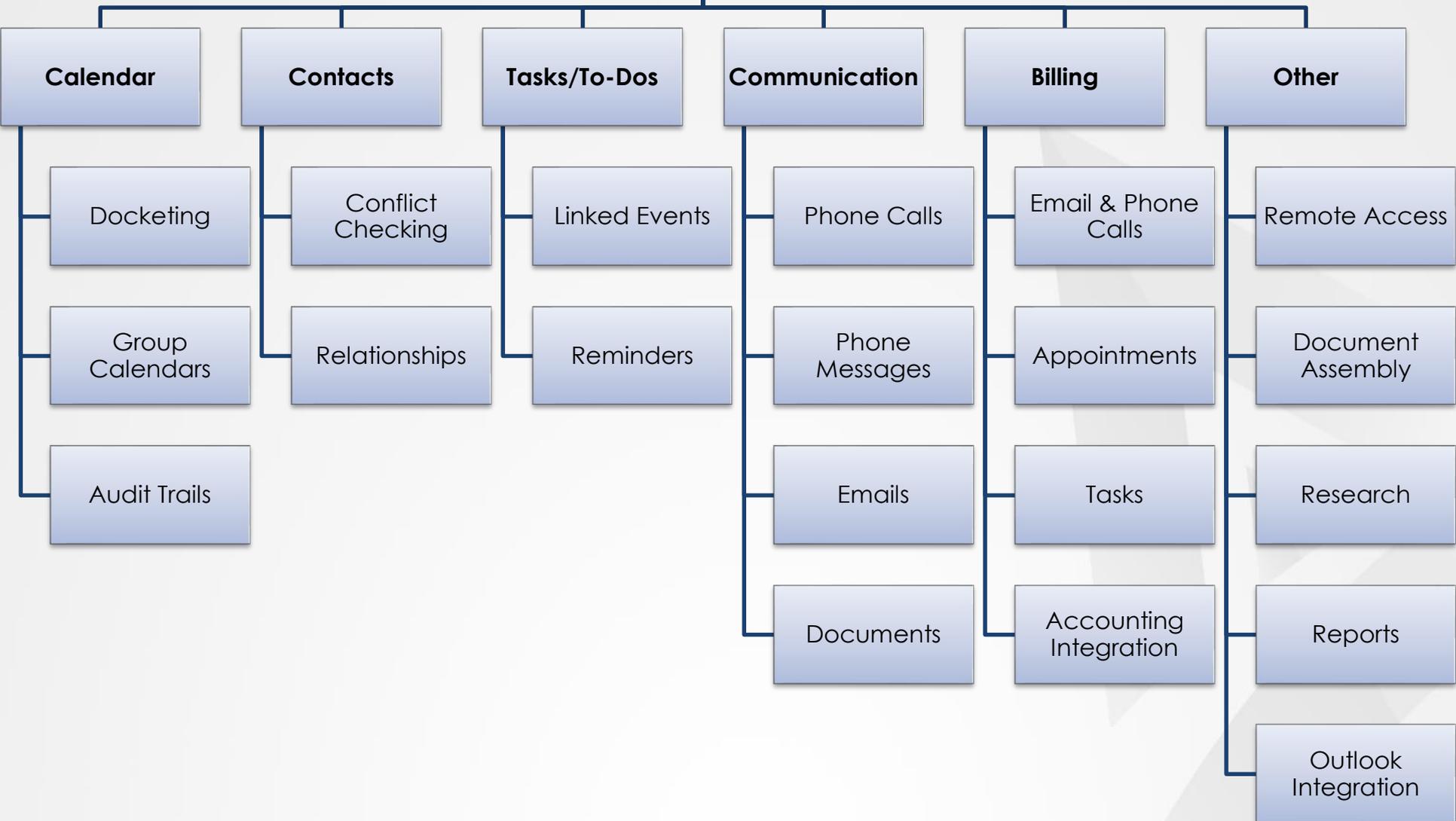
# Case Management Software

... 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?

**Name: Steven J. Best Esq. | Email: [sbest@affinityconsulting.com](mailto:sbest@affinityconsulting.com)**

**Social Media:**

