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Office Technology and Infrastructure

Themes:

- Understanding the importance of being aware of innovative legal technologies and how these breakthroughs will affect the legal field.

Conversation Starters:

- What are some of the most useful and practical new technologies lawyers should know about?

  ○ Do these new technologies vary between practice areas?

- How have new legal technologies changed the way lawyers approach their practice?

- How are lawyers using legal data analytics to help their practice?

- What can lawyers do to stay current on their knowledge of cutting-edge legal technology that may benefit them?

- What is the use of a practice management system, whether that is a proprietary software system or something developed in-house?

- If you adopt a separate billing system, can it integrate with your practice management software? Do you have a checks and balances system for your trust accounting? Can you at any time produce an accurate client trust ledger?

Activities:

- Review WSBA and ABA guidelines for use of iCloud storage, phones and tablets for using/storing client information. Develop a written policy that addresses security.

- Discuss adopting a practice-management/billing system. Make sure that it can be customized to how you intend to practice: cloud versus desktop accessibility by mobile device and/or remote office), number of licenses, trust accounting if required, and integration with other software providers (eg. Quickbooks, Freshbooks, document management software, etc).

- Discuss how calendars are used. Consider adopting a regimented system/ method for all deadlines, statutes of limitations, appointments, etc. Inquire as to whether or not your professional liability insurance has a preference.

**LAW OFFICE
PRACTICE**

Resources:

- Discuss what additional resources the mentor/mentee has found useful in their own practice.

- Washington State Bar Association

  ◦ Practice Management Assistance

  ◦ Lending Library

  ◦ NWSide Bar Blog