

# 4

## Office Technology and Infrastructure

### III. LAW OFFICE PRACTICE

#### 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 did the pandemic affect how lawyers use technology? Did the pandemic affect how you leverage technology in your office?
- 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? Can you at any time produce an accurate client ledger?
- What resources exist to help compare or educate about legal practice technology?

#### Activities:

- Review WSBA and ABA guidelines for use of iCloud storage, phones and tablets for using/storing client information. See the Law Firm Guide to Cybersecurity at [www.wsba.org/guides](http://www.wsba.org/guides). 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 (e.g., Quickbooks, Freshbooks, document management software).

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#### **Activities (continued):**

- 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.

#### **Resources:**

- Discuss what additional resources the mentor/mentee has found useful in their own practice.
- Washington State Bar Association
  - [Practice Management Assistance](#)
  - [Lending Library](#)
  - [Law Firm Practice Guides and Templates](#)