High Tech, High Touch: Using Technology for Better, Easier Client Service

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After beginning his career in private practice, Jeff began assisting other attorneys to better use technology in their law practice. Since 1998, he has assisted hundreds of law firms through custom configurations, training and general support.

Jeff is a certified or authorized consultant for dozens of law office applications and is a frequent author and speaker on a variety of legal technology topics.

Prior to embarking on his career as a Technology Professional, Jeff was engaged in the private practice of law. His legal background includes Plaintiff’s Personal Injury, Insurance Defense, Real Estate, Land Use Planning and Corporate Law.

Jeff is a 1996 graduate of the Marquette University Law School. He also holds a B.A. and M.A. in History from the University of Wisconsin-Milwaukee.
Evolution of Law Technology – The Future
Cloud Survey – Most valuable benefit of the cloud

Freedom of access
Attorneys in small law firms clearly believe the largest benefits of cloud technology rests in mobility and data back-up. The promise of the cloud is the ability to access data from anywhere, at anytime, and from any device.

IT expectations
Surprisingly, ease-of-use ranked a distant third. Our analysis of the data and market trends suggests the influence of the consumerization of IT. Technology from smart phones to tablet computers has merely made elegant simplicity an expectation. Ease-of-use is a minimum barrier to entry for cloud adoption.

Unconcerned over costs
Predictable costs, also ranked fairly low, which is equally surprising given cloud services often run on a subscription model and relieve law firms from the burden of maintaining IT infrastructure and the associated costs.

N = 279

Which of the following do you believe is the single most valuable benefit of cloud services for the legal profession (select one)?

Download the full copy of the report here:

http://demand.firmmanager.com/CloudReport
The Growth of Mobility

Source: WatchDox®
New Client Expectations
Client Expectations – The Age of Instant Information

Mi-fi/Hot Spots/Web searches
Consumers are increasingly mobile

How Do You Compare?

• 44% of cell owners have slept with their phone next to their bed because they wanted to make sure they didn’t miss any calls, text messages, or other updates during the night.

• 67% of cell owners find themselves checking their phone for messages, alerts, or calls — even when they don’t notice their phone ringing or vibrating.

• 80.3% of consumers delete an email on their mobile phone if it doesn't look good, up from 69.7% in 2012. 30.2% said they would unsubscribe.

• The average person has their cell phone with them 14 hours a day

• On average, it takes 90 minutes to respond to email vs. 90 seconds to respond to text

Source: Demandforce® an Intuit® company
**Most Recent Public Web Reviews**

1. **As always, excellent!**
   - henryc, San Diego, CA
   - As a regular patron, the service is excellent from the front desk to the back. Always courteous and a warm smile. The staff is very professional and the customer service always brings me back.
   - 5 days ago
   - Click to add business comments

2. **Well done!**
   - curtisb, San Diego, CA
   - Happy with this service, on time, on budget. We’ll be back.
   - 6 days ago
   - Click to add business comments

3. **Thrilled!**
   - elenas, San Diego, CA
   - I love your new email appointment reminders and the profile settings! I especially love the Add to Calendar feature - I hope this will be also sent out when we make a new appointment as well!
   - 6 days ago
   - Click to add business comments

4. **You are awesome**
   - jamesh, San Diego, CA
   - The staff is so friendly and helpful. The waiting area is clean and comfortable. Thank you so much!
   - 1 week ago
   - Click to add business comments

5. **Excellent**
   - kevinm, San Diego, CA
   - You are great, enjoy talking with you. It’s always a good experience for me, on each visit!
   - 1 week ago
   - Click to add business comments
Potential clients are using tools like these to find representation.
Why Lawyers Are Slow To Change
Is the cloud secure?
Most attorneys in small law firms – about 41% – believe the cloud is secure. By contrast, just 9% believe it is unsecure. Those that said the cloud is not secure plainly cited government snooping as a major concern which isn’t surprising given the vast media coverage stemming from Edward Snowden’s leak of classified NSA documents.

In the middle of security
More than one-third – 35.5% – simply were not sure if the cloud is secure. Despite the maturity of such technologies, we believe this is reflective of how relatively new cloud-based tools are in the legal industry. Many tools, especially those provided by vendors catering to the legal market bring industrial strength security that is difficult to match in a small law firm.

Do you believe confidential data stored in cloud services can be safe and secure?

Download the full copy of the report here:
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In their own words
For those that answered “no” we asked why they believed the cloud was unsecure. The word cloud nearby aggregates the words in the most common answers and a representative sample of responses are included below. \( N = 25 \)

Why isn’t the cloud secure?

“NSA access possibilities”
“Because others outside the firm have access to it.”
“If stored offsite too easy to access and issues of whether accessibility by other without permission, including governmental bodies.”
“Rogue employees are unpredictable and they can be in any company or governmental agencies”
“Any security developed can always be hacked or breached with enough knowledge or skill.”

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http://demand.firmmanager.com/CloudReport
How Data is Lost

- Accidental Sharing
- Insider
- External Attack
- Lost Device
- Other

Source: Forrester Research 9/2012
BRAND X will have no responsibility for any harm to your computer system, loss or corruption of data, or other harm that results from your access to or use of the Services or Software.

BRAND X: If you add a file to your [Brand X] that has been previously uploaded by you or another user, we may associate all or a portion of the previous file with your account rather than storing a duplicate.

BRAND Y: When you upload ... content to our Services, you give Brand Y (and those we work with) a worldwide license to use, host, store, reproduce, modify, create derivative works ... communicate, publish, publicly perform, publicly display and distribute such content.

BRAND Y: Your domain administrator may be able to ... access or retain information stored as part of your account [and] restrict your ability to delete or edit information... or privacy settings.
Above all, your confidential client data belongs to your client.

Questions to ask:

- What are your contract terms/conditions?
- Policies on Government requests?
- Data return procedures?
- What happens when you cancel?
- How are third parties vetted?
- Use of my data internally?
- Is any anonymized information used?
New Thinking on Old Standards

Model Rule of Professional Conduct 1.15: Safekeeping Property
A lawyer shall hold property of clients or third persons that is in a lawyer's possession in connection with a representation separate from the lawyer's own property. ... [P]roperty shall be identified as such and appropriately safeguarded. Complete records of [the] property shall be kept by the lawyer and shall be preserved for a period of [five years] after termination of the representation.
Change is the law of life. And those who look only to the past or present are certain to miss the future. — John F. Kennedy
Expanding Your Presence

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Suite 1710
Fort Lauderdale, FL 33394
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Facsimile: (954) 848-2801

Meet Ruby, your real, live virtual receptionist.

Ruby is the smart and cheerful team of virtual receptionists trained to make a difference in your day. From our offices in Portland, Oregon, we handle your calls with care. We deliver the perfect mix of friendliness, charm, can-do attitude, and professionalism. Best of all, your callers will think we work in your office. Meet us!
Making it Easy to Do Business

Email Invitations

Here you can:
- Send a Quick Invitation
- Send invitations for recurring activities
- Invite up to 200 people to meet with you using a single email

Send invitations with a schedule button that will compel people to schedule time with you.
Cloud Survey – Which services are being used

Where the cloud currently being used
Of the approximately 40% of respondents who said they were currently using the cloud, applications related to storage and back up were by far the most popular.

Sixty percent of respondents said they used the cloud for document storage or management, while 56.4% said they used the cloud for back up and disaster recovery.

Email followed in a close third with 53.6% and surprisingly, given the extensive media attention around such services, file sharing ranked fourth with just 46.4%.

N = 110

Which of the following services are you using in the cloud?

Download the full copy of the report here:

http://demand.firmmanager.com/CloudReport
• Forrester: “hottest technology category since social”
• Used by 25% of all knowledge workers, up from 5% in 18 months
• Billion dollar market in less than 3 years

13
The average number of file sharing programs used

76%
Of organizations send traffic to Dropbox
What Defines Digital Documents?
Serving Clients How They Consume
Contact info:

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