STATE BAR OF WISCONSIN

PINNACLE

Your Practice. Our Purpose.

WSSFC 2023

Technology Track – Session 1

Technology Considerations When Setting Up a Law Practice

Presented By:

Christopher C. Shattuck, Madison College, Madison

Jeffrey S. Krause, Affinity Consulting Group, Waterford

About the Presenters...

Christopher C. Shattuck is the Program Director and Legal Studies/Paralegal Program Instructor at Madison College. Previously, Mr. Shattuck managed a department and litigated cases for a creditor's rights firm in Milwaukee. He then dedicated close to six years to the State Bar of Wisconsin as their Law Practice Assistant Manager. Throughout this period, Mr. Shattuck provided over two thousand consultations, authored more than fifty published articles, and delivered over one hundred presentations, all focused on practice management, technology, and their ethical implications. Mr. Shattuck earned his undergraduate and Master of Business Administration degrees from the University of Wisconsin - Oshkosh and completed his Juris Doctor at the University of La Verne College of Law in southern California.

Jeff Krause is part of Affinity's document management team. He specializes in corporate legal department deployments and workflow design and efficiency. Jeff practiced law for two years after finishing law school in 1996, but decided technology was a better path for him. He began working for a pioneering legal technology consultancy called MicroLaw in 1998. In 2003, Jeff started his own legal technology consultancy, which he ran until 2016, when he joined Affinity. Jeff's superpower is patience, and his favorite part of his job is the satisfaction of helping someone solve one of their business problems.

Technology Considerations When Setting Up a Law Practice

By: Jeff Krause & Christopher C. Shattuck

Outline

1. Hardware & Software Solutions
    A. Overview
        i. Laptop with Add-ons
        ii. Monitor, Printer, & Scanner
        iii. Accounting, Billing, & Case Management Software
        iv. Office 365 & PDF Software
    B. Hardware Costs

Item	Cost
Dell Inspiron 15	$800.00
USB Docking Station	$100.00
2x 24-inch Monitor	$400.00
Fujitsu ScanSnap ix1500	$500.00
Dell C1760NW Color Laser Printer	$350.00
Total	**$2065.00**

    C. Monthly Software Costs

Item	Cost
Office 365 Business Premium	$12.50
Time and Accounting	$75.00
DMS, Secure Sharing, Digital Signing	$100.00
Total	**$187.50**

    D. State Bar Discounts – Technology

    E. State bar Discounts – Case Management Software

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2. Document Management Systems
    A. The Offerings
        i. OneDrive, Dropbox, Box, ShareFile, and NetDocuments.
3. Client Communications Platforms
    A. **Email Management** - Tag emails to a Matter in Outlook. See the complete list of case communications in your practice management application. Centerbase Case Email panel shown above.
    B. **Text Messaging** - More and more clients want to text with their lawyers. With this feature, you can text without giving out your personal cellphone number and ensure the messages are being stored in the case management system.
    C. **Client Portal** - Secure client portals for you to exchange invoices, documents, or communications with your clients.
4. Networking & Data Security
    A. Breach of Security
        i. Think about all the servers that an unencrypted email travels through before reaching its final endpoint.
        ii. Your Email Server > Their Email Server > Their Computer
        iii. End-to-end encryption ensures no third party can review the message, only pass along the contents of the encrypted message.
        iv. The following items cannot be encrypted as they will always be sent across the Internet in plain text: Subject, To, From, & CC Lines & File attachment names.
    B. The Journey of An Unencrypted Email
        i. Think about all the servers that an unencrypted email travels through before reaching its final endpoint.
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        iv. The following items cannot be encrypted as they will always be sent across the Internet in plain text: Subject, To, From, & CC Lines & File attachment names.
    C. Encrypt with Microsoft 365 Message Encryption – Learn how to easily encrypt messages with Microsoft.
    D. Password Storage Providers
        i. The Best Password Managers for 2022 – Provides comparison of password managers (price, features, and reviews).
        ii. 5 cybersecurity steps you should already be taking – Discusses encryption steps, including the use of a password manager.
        iii. 101: Encryption Made Simple for Lawyers – In-depth explanation of how encryption works.

E. Messaging Encryption
   i. Digital security depends on the type of text messages you are sending.
       - For example: SMS, MMS, Apple or Android Messages
   ii. The same is true for the type of instant messages you are exchanging.
       - [Social Media: Who's Got Your Data?](#)
   iii. Another issue that arises is capturing and saving the messages you exchange with your client into the client's file.
       - [EF-17-01 Retention and Destruction of Closed Client Files](#)
   iv. **Source:** [The 411 on Texting for Lawyers](#)
F. Securing Web-based Communications
   i. Web-based communications include material submitted via online forms and on e-commerce website locations. It may also include uploaded files such as photographs and documents. Any information transmitted on an unencrypted website can be intercepted. Likewise, if an insecure internet connection is used, hackers can intercept information before it reaches a secure website.
   ii. It is important to understand how web browsers distinguish secure websites. It is important to use only encrypted websites when visiting websites that deal with PII, financial data, or client information.
   iii. Source: [Encrypting Your Law Firm](#)
G. Virtual Private Network
   i. [How to set up a VPN in Windows](#)
   ii. [Connect your Mac to a VPN](#)
   iii. [How to set up a VPN on Android](#)
   iv. [How to configure VPN access on your iPhone or iPad](#)

5. Artificial Intelligence
A. [What is AI and How Can Law Firms Use it?](#)
   i. Artificial intelligence (AI) is the simulation of human intelligence by machines to perform tasks typically done by people.
   ii. Machine learning is a subset of AI. It refers to humans training machines to learn based on data input. More than simply performing (or mimicking) a human task, machine learning looks for patterns in data to draw conclusions.
   iii. Natural language processing (NLP) is another subfield of AI that focuses on helping computers communicate with us humans in our own language. Put simply, NLP enables computers to read text or hear speech and then understand, interpret, and manipulate that natural language—just as humans would do.
B. [ChatGPT Artificial Intelligence: Will It Replace Lawyers and Legal Staff?](#) - Before using the technology, ensure you review and comprehend both the technology itself and your ethical obligations.

C. [LEXIS AND WESTLAW LEGAL RESEARCH AI](#) – Newest and greatest AI legal research products.

D. [MICROSOFT COPILOT – WORD, EXCEL, & POWERPOINT](#) – Same as above, but with your word processing, presentation, and data analysis tools!

Technology Considerations When Setting Up a Law Practice

WISCONSIN SOLO AND SMALL FIRM CONFERENCE 2023

OCTOBER 19, 2023

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Presenters

Jeff Krause
Affinity Consulting

Christopher C. Shattuck
Madison College

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Agenda

1. Hardware & Software Solutions
2. Document Management Systems
3. Client Communication Platforms
4. Networking & Data Security
5. Artificial Intelligence

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1. Hardware & Software Solutions

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1. Hardware & Software Solutions

OVERVIEW

- Laptop with Add-ons
- Monitor, Printer, and Scanner
- Billing
- Accounting
- Office 365
- PDF
- Case Management

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1. Hardware & Software Solutions

HARDWARE COSTS

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1. Hardware & Software Solutions

STATE BAR DISCOUNTS – TECHNOLOGY

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1. Hardware & Software Solutions

STATE BAR DISCOUNTS – CASE MANAGEMENT SOFTWARE

2. Document Management Systems

2. DOCUMENT MANAGEMENT SYSTEMS

THE OFFERINGS
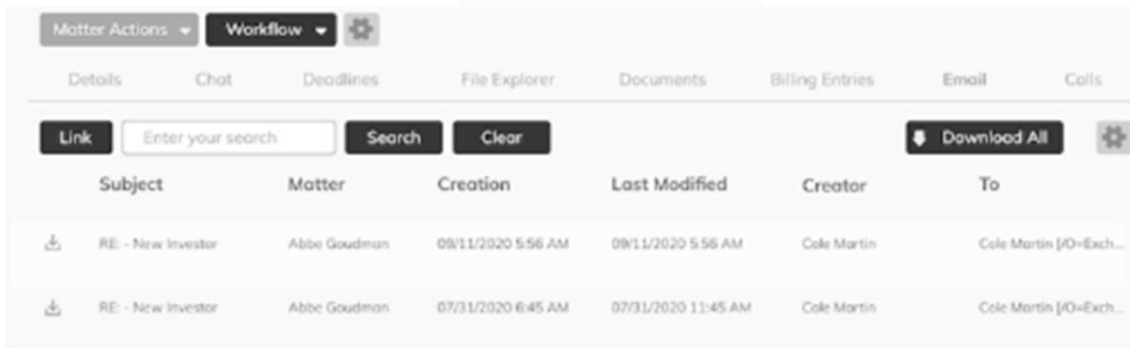
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3. Client Communication Platforms

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3. CLIENT COMMUNICATION PLATFORMS

EMAIL MANAGEMENT

Tag emails to a Matter in Outlook. See the complete list of case communications in your practice management application. Centerbase Case Email panel shown above.

3. CLIENT COMMUNICATION PLATFORMS

TEXT MESSAGING

Send and receive text messages in Clio.

Securely send texts and event notifications through Clio. Provide clients with quick updates and answers to their urgent questions—without using your personal phone number.

- ⊘ Get assigned a toll-free phone number
- ⊘ Reduce no-shows with event text notifications
- ⊘ Automatically log your message threads

More and more clients want to text with their lawyers. With this feature, you can text without giving out your personal cellphone number and ensure the messages are being stored in the case management system.

3. CLIENT COMMUNICATION PLATFORMS

CLIENT PORTAL

ℤola Caseway™ Portals	Standard Portal	Signature™ Portal
Ability to share documents with collaborators	✓	✓
Ability to share invoices with clients	✓	✓
256-bit, bank-level encryption	✓	✓
Cost	Included	One-time fee

Secure client portals for you to exchange invoices, documents, or communications with your clients.

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4. Network & Data Security

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4. Network & Data Security

BREACH OF SECURITY

- Wisconsin Ethics Opinion EF-15-01: "If there has been a breach of the provider's security that affects the confidentiality or security of the client's information, SCR 20:1.4(a)(3) and SCR 20:1.4(b) require the lawyer to inform the client of the breach."

    - "While beyond the scope of this opinion, other law, such as Wis. Stat. § 134.98, may also require a lawyer to inform the client of a breach."

- Wis. Stat. § 134.98: Notice of unauthorized acquisition of personal information.

- Responding to a Data Breach – Must read article for attorneys!

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4. Network & Data Security

THE JOURNEY OF AN UNENCRYPTED EMAIL

- Think about all the servers that an unencrypted email travels through before reaching its final endpoint.

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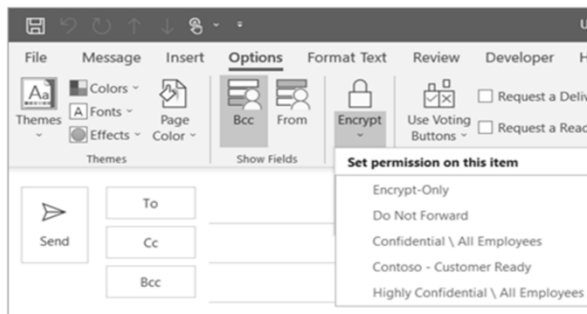
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4. Network & Data Security

ENCRYPT WITH MICROSOFT 365 MESSAGE ENCRYPTION

If you are a Microsoft 365 subscriber, here is what is new to you:

In an email message, choose **Options**, select **Encrypt** and pick the encryption that has the restrictions you want to enforce, such as **Encrypt-Only** or **Do Not Forward**.

4. Network & Data Security

PASSWORD STORAGE PROVIDERS

- The Best Password Managers for 2022 – Provides comparison of password managers (price, features, and reviews).

- 5 cybersecurity steps you should already be taking – Discusses encryption steps, including the use of a password manager.

- 101: Encryption Made Simple for Lawyers – In-depth explanation of how encryption works.

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- **Source:** Encrypting Your Law Firm

4. Network & Data Security

VIRTUAL PRIVATE NETWORK

- How to set up a VPN in Windows

- Connect your Mac to a VPN

- How to set up a VPN on Android

- How to configure VPN access on your iPhone or iPad

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5. Artificial Intelligence

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5. Artificial Intelligence

CHATGPT ARTIFICIAL INTELLIGENCE: WILL IT REPLACE LAWYERS AND LEGAL STAFF?

- **Before using the technology, ensure you review and comprehend both the technology itself and your ethical obligations.**

> CH — What is the standard a party must meet in Wisconsin to obtain relief from admissions in a state civil court action? Please only cite the Wisconsin statute and one applicable Wisconsin case.

> As of my last knowledge update in January 2022, and it is crucial to cross-verify as statutes and case law can change, in Wisconsin, parties looking to obtain relief from admissions in a state civil court action need to refer to the Wisconsin statutes that govern civil procedure, specifically Wis. Stat. § 804.11(1)(b), which addresses Requests for Admission under the discovery rules.
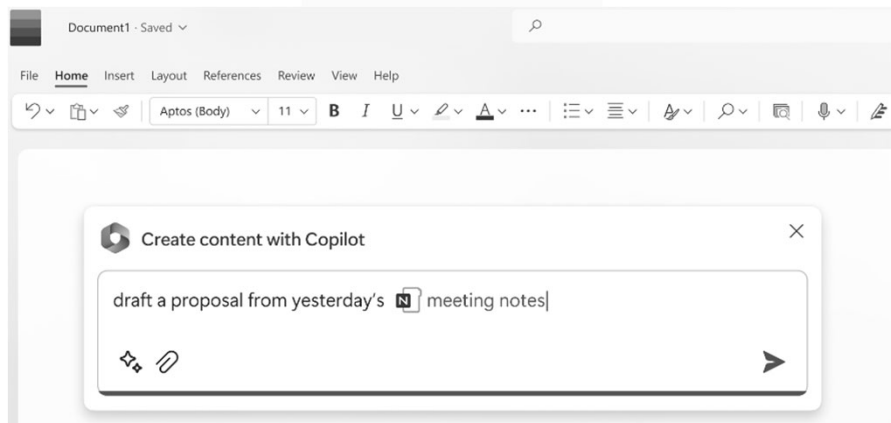
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5. Artificial Intelligence

LEXIS AND WESTLAW LEGAL RESEARCH AI
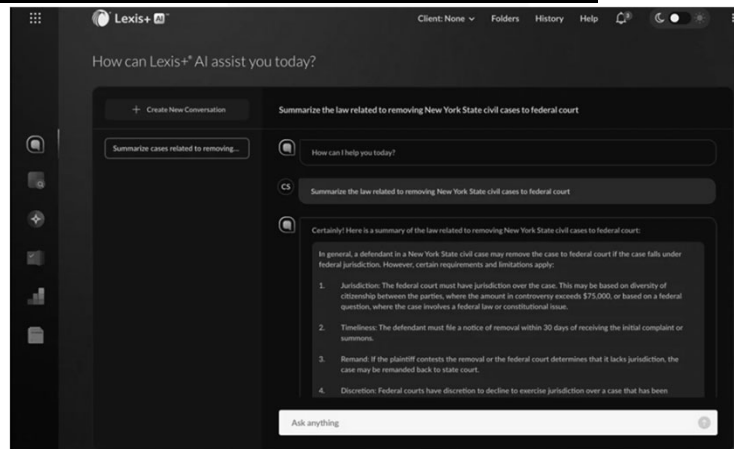
5. Artificial Intelligence

MICROSOFT COPILOT – WORD, EXCEL, & POWERPOINT

Questions?

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Thank You!

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