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Technology Track – Session 1

State of Law Firm Technology for Solo & Small Firms: What Technology to Look For

Presenter:

Jeffrey S. Krause, Affinity Consulting Group, Waterford

About the Presenter...

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.

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Presented by:
Jeffrey S. Krause
Affinity Consulting Group

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Introduction

Law firm technology has always been evolving. For a long time, legal technology was about best-in-breed. Certain products were so good or fit the firm so perfectly that it was tolerable when that product did not talk to your other systems or required manual or double entry. It was inconvenient and inefficient but worth the extra time because that product was such an upgrade to the old way of doing things.

Today, this type of inefficiency will cost you time and money. The time it takes to enter something twice and the chance of making an error have led firms to focus on integrations and platforms more than standalone tools, no matter how good those tools are. The state of law firm technology today is to either utilize one product that does everything or make sure that multiple products work together.

Your Tech Stack

Throughout this presentation, we will refer to your technology stack or simply tech stack. Let us quickly define what we mean when using this term. Your tech stack is the collection of technology tools that you use within your firm. Every business does three things – get more work, do the work, and get paid for the work. Your technology needs to help you do these things as efficiently as possible. In addition, every business has a strategic or management aspect. Technology provides management with the information to make informed strategic decisions.

When you consider these four aspects of a business, you should see your tech stack in a different light. It is not enough to have a great tool that helps you in only one aspect. Efficiency demands that the tools you use in each aspect work together or at least do not interfere with each other. The system you use to track and onboard new clients should hand information off to the tools that help you do the work. Those tools should make it easy to record what has been done so that you can get paid. All these systems should provide data to management to enable proper decision making.

Can you survive with an outdated tech stack that does not work together? Of course. The question is whether you can thrive and whether you are keeping up with firms that are utilizing technology in a better way.

The Modern Law Firm Tech Stack

A modern small law firm's tech stack should balance client service, efficiency, compliance, and cost-effectiveness. The idea is not to buy "all the tech," but to have the right tools in

place to manage cases smoothly, protect client data, and free up attorney time for actual legal work. Here is a breakdown of what typically belongs in a well-rounded small firm tech stack:

Core Functions

1. Practice Management Software

- All-in-one hub for calendaring, tasks, matter management, and billing.
- Key features: matter-centric organization, trust accounting compliance, built-in client communications.

2. Timekeeping & Billing

- Must be part of or full integrated with practice management software but worth emphasizing as a specific item.
- Should support multiple billing models (hourly, flat fee, subscription, contingency).
- Online invoices and e-payments are now expected.

3. Document Management & Automation

- Secure, searchable storage of documents.
- Should be part of or fully integrated with practice management.
- Examples: NetDocuments, iManage (larger), Worldox, or SharePoint/OneDrive if configured correctly.
- Automation tools (e.g., HotDocs, LawYaw) speed up drafting routine docs.

4. E-Signature Tools

- Faster client intake and document execution.
- Ideally integrated with document management system.

Security and Compliance

5. Secure Email & Client Communications

- Encrypted email or client portals for sensitive messages.
- Outlook/Exchange with added encryption and multi-factor authentication.
- Some practice management tools include secure messaging.

6. Cybersecurity Essentials

- Multi-factor authentication (MFA) on all systems.
- VPN or another secure way to work remotely.
- Endpoint protection/strong antivirus.
- Regular backup systems including local and cloud files.

Productivity & Collaboration

7. Office Suite & Collaboration Tools

- Microsoft 365 for email, word processing, and collaboration.
- Teams for internal communication.

8. Calendaring & Task Management

- Should synchronize across practice management, Outlook, and mobile devices.
- Automated court rule calendaring if appropriate (e.g., LawToolBox, CourtRules).

Client-Facing Tools

9. Intake & Forms Automation

- Online forms for client intake that feed into practice management and document management.
- Reduces double-entry and improves client experience.

10. Client Portal

- Secure file sharing, updates, billing, and messaging.
- Gives clients “24/7 access”.

11. Client Relationship Management (CRM)

- Tracks leads, referral sources, and marketing campaigns.
- Examples: Lawmatics, HubSpot, Clio Grow.

Data & Analytics

12. Reporting & Analytics

- Dashboards for revenue, billing realization, utilization rates, marketing return on investment (ROI).
- Most practice management tools include this, but some firms supplement with Power BI or another tool.

Optional / Emerging Tech

13. AI Tools (after careful vetting)

- Drafting assistance (e.g., Microsoft Copilot, Harvey AI, Casetext CoCounsel).
- E-discovery/litigation support (Everlaw, RelativityOne for smaller cases).
- Contract review tools for transactional practices.

14. Knowledge Management

- Internal wiki or precedent library.
- Can be as simple as Notion or Confluence.

For a small firm, the “must-have” foundation is practice management, document management, secure communication, billing/e-payments, and office productivity tools. From there, you layer on CRM, intake, and automation as the practice grows. AI and analytics are increasingly moving from “nice to have” into “competitive advantage.”

The Role of AI

Like every legal conference with a technology track, you will hear a lot about AI at this conference. The legal technology landscape is crowded with AI tools, and every long-term legal tech player is clamoring to include or at least claim their application utilizes AI. This is not a fad. AI is here to stay and will only become increasingly important. The question is what to do now.

At a minimum you should be experimenting with and utilizing AI where it makes sense. You do not have to jump into one of the expensive tools right now unless you are sure it does what you need and, most importantly, believe it is going to survive the inevitable shake-out in the industry. On the other hand, you cannot afford to wait and do nothing. Unless you have a specific need and you have fully vetted one of the more expensive tools, my recommendation is that you start learning to use AI with one of the less-expensive, more general tools such as Copilot or ChatGPT Business.

Both Copilot and ChatGPT have free versions. However, you should consider paying for one of the less expensive monthly plans for several reasons. First, the free plans are limited in. One limitation is quantity. The number of conversations is limited as well as the length of the conversations. You will hit this limit in both Copilot and ChatGPT and you will hit it sooner than you think, often just as you are getting somewhere with your conversation. Another limitation is privacy, at least with ChatGPT. Only the ChatGPT Business or Enterprise plans automatically exclude your data from being used to train the AI models. This is important to keep your client data secure. ChatGPT Business is \$30 per user, per month or \$25 per user per month if billed annually. Copilot pricing is a bit more complicated but works out to around \$24 per user per month if you add it to your existing Microsoft 365 plan for which you are already paying \$12.50 or \$20.00.

Tipping Points Regarding Your Tech Stack

General Tipping Points

When it comes to tipping points, some are application specific, and some are more general in nature. Here are some things that might indicate issues with your tech stack.

One sign that you need to evaluate your tech stack is that you are doing repetitive tasks manually. Of course, not every task can be automated with technology, but many can. It is easy to calculate the cost/benefit of repetitive tasks. If you do the same task ten times per week and it takes an hour each time, you can calculate the cost both in time and in people. If that task can be automated so that it now takes only fifteen minutes, you can now a) do it forty times per week, or b) have seven and a half hours to do something else.

Another sign that your overall tech stack needs an evaluation is that you are storing information in multiple places that are not talking to each other. At best, having to look in multiple places for information slows you down. While you may eventually find what you are looking for, it takes time to look for it and more time to consolidate it once you do. At worst, having to look in multiple places means that you lose track of the information altogether. People may put the information in the wrong place or forget to enter it at all in one of those places.

Issues with information and collaboration are another sign of your tech stack being behind the technology curve. We live in a time where people expect information to be easily and immediately accessible. However, as a lawyer, you have a duty of confidentiality. How do you reconcile these two concepts? Is the way you are sharing information fast and easy enough for your clients but secure enough for you? Also, it is not all about sharing information these days. Collaboration is a crucial factor as well. Whether that means

sharing information back and forth or working simultaneously on a document online, clients are increasingly expecting their lawyers to use modern technology. They appreciate your concerns about confidentiality but wonder why their health care providers and financial institutions can do things that you cannot.

Things move fast these days, and it can be difficult to stay on top of everything. If you find yourself dropping balls, both large and small while you juggle matters and deadlines, you may need to evaluate your tech stack for a better way. The issue might be how you gather the information about matters and deadlines, where you put that information, how you put it there, how you monitor it, or how you act on it. Each of these scenarios may indicate that one or more pieces of your tech stack are not getting the job done.

Practice Management

Practice Management ties everything together in a matter-centric way. Within your practice management system, you track contacts, appointments, time entries, notes, documents, and client communications. If your system is years old or you have not kept up with the new features of the system you do have, it might be time to re-evaluate.

Here are some symptoms that your practice management needs a check-up.

Intake is the process of onboarding a client. Poor intake leads to missed consultations, double bookings, and disjointed follow-up. These things make a poor first impression and cause matters to start off “on the wrong foot.” A modern practice management tool can take you from a combination of Post-it notes, emails and “don’t forget” to online forms, scheduling tools, and automation.

If your matter management relies on a combination of email folders, sticky notes, spreadsheets, and tribal knowledge, you do not really have a system. Modern practice management centralizes matter details or links everything together. Stop asking, “Where is that document?” and “Who is working on that?”

For many years, client communication was written or via telephone. Eventually, email became the most common form of communication. However, people communicate in many ways today and your clients are no exception. Yes, some of your clients will prefer a phone call but others will prefer a text. Some clients will be happy to drop off documents at your office or mail the documents, but others will prefer to upload them to a client portal. Some will be happy to pay by mailing a check, but others will want to pay online with a credit card. You need to be able to communicate in any of these ways.

You cannot improve what you do not measure. You need to know which practice areas are profitable, which clients are chronically delinquent in payments, and which attorneys and

staff are overworked or underworked. Your practice management tool should provide these types of analytics. Without them, you cannot make informed decisions about your business.

Cash is king. You cannot pay yourself or your staff if you do not have reliable cash-flow. Time entry needs to be easy, billing needs to be easy, and payment needs to be easy. If you are struggling with any of these things, it may be your process. On the other hand, it might be the tool you are using. The only way to make sure is to evaluate both.

Document Management

Document Management is the “logical and consistent way to save documents (and emails) so that you can find them later when you need them.” You know you have reached a tipping point when you cannot find documents when you need them. This might mean you cannot find them at all, or it might mean it takes too long. Either way, it is wasting your valuable time.

There are three basic ways we look for documents: recency, navigation and “needle-in-a-haystack” searching. Recency means a simple list of documents we are currently working on. Navigation is when we know where the document is and simply go there such as the windows folder. “Needle-in-a-haystack” is when we know there is a document out there somewhere, but you just do not know where it is. Sometimes, this can also mean you need to find “all of the needles in all of the haystacks” such as when you want to review multiple contracts and pull the best parts from each.

When you find yourself unable to do any of these things, you have reached a tipping point. Recency is usually not the problem. Navigation may become a problem as your firm grows. This is because different people organize documents slightly differently. Even small variations in organization can lead to situations where you have to hunt for a document someone else saved. “Needle-in-a-haystack” is always difficult and becomes harder over time unless the firm has a dedicated document management software tool. The question is how big of a headache it is and how much you want to spend to address it.

Upgrading Your Tech Stack

Understand the Issue(s)

The tipping points described above are more than just a list of frustrations. They are indicators of what needs to be corrected in your tech stack and are critical to how you evaluate new products. Once you have listed everything in your tech stack and identified where you have tipping points, you can begin the evaluation process.

You need to fix what is broken. If your technology is years out of date, this might mean that you have to fix a significant portion of your technology stack. In other cases, there are one or two parts of your tech stack that have reached a tipping point. Always keep in mind that things need to work together. Unfortunately, this means that fixing the “one” thing that is broken means an upgrade to something else that you did not think was broken.

Let us look at some real-world examples. What if you use Worldox as your document management tool? You may still love it, but have you reached a tipping point where you need better ways to work remotely? You might be able to address this tipping point by implementing a different way to access the Worldox system remotely. On the other hand, moving to a system that is completely cloud-based may be a better option. Why? Because Your time and billing system is cloud based and integrates with SharePoint or NetDocuments. Perhaps replacing Worldox is a better option in that case.

What if your time, billing, and accounting tool is the Tabs3 suite of products? They still work great, but you need better client onboarding and a better way to track information about your matters. The answer may be to add PracticeMaster, which is basically part of the Tabs3 suite. However, that could change if document management is also an issue. You may feel that the document management built into PracticeMaster does not get you where you need to be. Now what do you do? You could add another product to the mix, especially if it is something like NetDocuments which has a nice integration with PracticeMaster. Alternatively, you could look for one product that does everything (time, billing, accounting, practice management, and document management).

The point is that it is not always a straightforward decision, and you should not jump at the first possible solution. You need to consider the tipping point that caused to evaluate but you also need to consider how the different solutions fit into your tech stack. The problem may be bigger than the single tipping point where you started. Unfortunately, attempting to fix one tipping point may reveal others.

Evaluating Products

Understanding your tipping points in addition to the rest of your tech stack is the key to evaluating new products. If you only consider the tipping points, you can fall into a trap of trying to fix one problem without regard to how the change impacts everything else. You want to evaluate products not just for how they will fix the immediate problem. The product needs to fit into the big picture. That said, your tipping points do give you a place to start.

Start by researching products in the space you are considering an upgrade. For example, if document management has reached a tipping point, research document management products. Get a demo of any products that look promising. Come to the demo armed with

questions that revolve around your tipping point but do not stop there. You also need to ask how the product integrates with the rest of your tech stack. Ask to SEE how the product does the things you need it to do as well as how it integrates. Never take a vendor's word for it. If you need to schedule a second demonstration to see a particular integration in action, that is fine. You need to confirm that it exists and that it works the way you need it to.

Always invite all the necessary people to any demonstration. If your tipping point is not getting paid on time and you are evaluating billing software, it is probably not enough to have someone familiar with your billing process. Your bills cannot go out without the time being entered. Make sure someone who enters time is part of the conversation as well as someone from accounting. All of these things work together, and you do not want to fix one thing while breaking another.

Proper Implementation

At last year's conference, I spoke about the implementation mindset. Once you have determined which a product to implement, you need to implement it the right way. Successful technology projects follow a process. Make sure that you have a project plan. If an outside vendor or consultant is involved, they should provide you with one. While the specifics will depend on the technology being adopted, technology projects have six phases – Kickoff, Discovery, Technical Implementation, Testing, Go-Live and Post-Project.

Your tipping points are particularly important in the Discovery, Technical Implementation and Testing phases. During Discovery, you will dig into the details of the tipping points and how they will be addressed. This is also where you make sure none are being overlooked. During Technical Implementation, you configure the product to do what you need it to do, including how it addresses any tipping points. The Testing phase is when you make sure the configuration does what it needs to and plan for how you will train everyone on your team. You do not want to wait until Go-Live to find out that you have implemented new technology without addressing the tipping point or creating a new one.

Conclusion

Law firm technology is always changing and always evolving. Your tech stack needs to evolve as well. Law firms can no longer rely on outdated systems that do not talk to each other. The first step is to identify what is not working. Next, you must find a solution that addresses that tipping point without simply creating a new series of tipping points. Only then, should you move forward with changes to your tech stack. This requires careful consideration. Do not jump at the first thing that seems to offer a quick solution. Once you

have decided on the product that works, proper implementation is necessary to make sure you have addressed the tipping point you started with.

About the Speaker

Jeffrey S. Krause is a Wisconsin attorney and a senior consultant with Affinity Consulting Group where he is a member of the Strategy team. He has spent more than twenty-five years assisting legal organizations of all types and sizes choose the right technology and use it the right way.

Jeff writes and speaks on a variety of topics related to legal technology and efficiency. He is a long-time planning committee member and a past chair of the Wisconsin Solo and Small Firm Conference and the Milwaukee Bar Association Law and Technology Conference.

In 2024, the State Bar of Wisconsin honored him with the John Lederer Service Award, which celebrates lawyers focused on improving the lives and practices of solo and small firm attorneys. In bestowing this award, the bar recognizes Jeff as exemplifying the leadership, spirit, and dedication of attorney John Lederer, who saw it as his mission to help solo and small firm lawyers master the skills and technology needed to build their practices.