A Law Firm
Technology Checklist

*Survey Says to Digitize Today for
a Profitable Tomorrow*

ABACUS**NEXT**

The Modern Law Firm Checklist

When surveyed, 82% of firms describe technology as "extremely" or "very" important in running a law firm[1]. To thrive today and in the future, firms must support remote work, secure their data, and cater to client convenience. Here are the essential criteria that elevate a law firm into higher productivity and profit or challenge them in a time of crisis.

Accelerate collections with electronic billing and payment

Are you streamlining operations and reducing costs through automation?

☐ Yes   ☐ No

Automation will reduce manual errors and improve compliance and efficiency. By digitizing workflows, your staff can focus on profit-driving work rather than spending hours on administrative upkeep.

Have you eliminated paper and storage?

☐ Yes   ☐ No

Documents are the lifeblood of the legal field, which means law offices can quickly fill up with paper files. Going digital reduces the need for storage, improves version control and ensures everyone has the most accurate and current information at their fingertips any time they need it.

Are you informed about new legislation and data privacy compliance requirements?
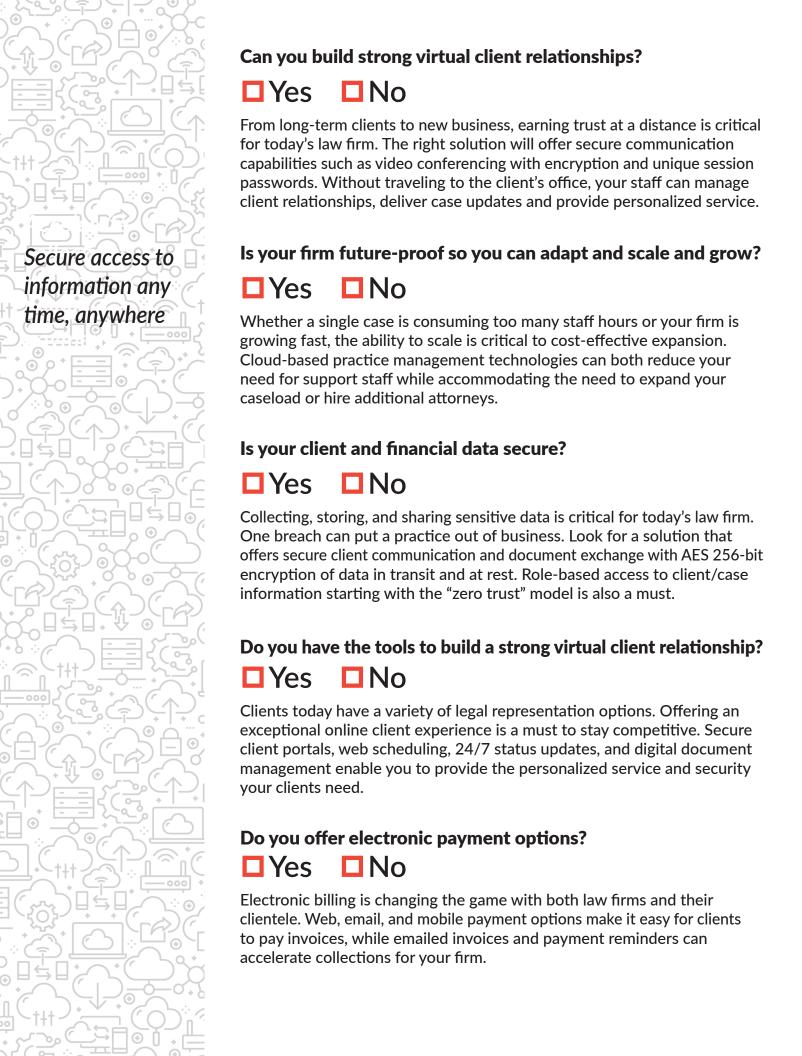
☐ Yes   ☐ No

State, federal, and international regulations continue to evolve, with new bills and requirements for specific regions and types of data. To ensure your firm secures and transmits data correctly, choose a solution that does the heavy compliance lifting for you.

Can you support remote staff?

☐ Yes   ☐ No

In the new version of normal, your support staff, attorneys and partners are likely to work from a variety of locations — and use different operating systems and devices. The easiest way to reduce friction and productivity delays while unlocking remote access to firm resources is moving to the cloud — with no IT specialist needed.

[1] *Above the Law, Industry Report: Survival or Evolution — Law Firms Navigate a Digital Metamorphosis,* June 2020

Secure access to information any time, anywhere

Can you build strong virtual client relationships?

☐ Yes   ☐ No

From long-term clients to new business, earning trust at a distance is critical for today's law firm. The right solution will offer secure communication capabilities such as video conferencing with encryption and unique session passwords. Without traveling to the client's office, your staff can manage client relationships, deliver case updates and provide personalized service.

Is your firm future-proof so you can adapt and scale and grow?

☐ Yes   ☐ No

Whether a single case is consuming too many staff hours or your firm is growing fast, the ability to scale is critical to cost-effective expansion. Cloud-based practice management technologies can both reduce your need for support staff while accommodating the need to expand your caseload or hire additional attorneys.

Is your client and financial data secure?

☐ Yes   ☐ No

Collecting, storing, and sharing sensitive data is critical for today's law firm. One breach can put a practice out of business. Look for a solution that offers secure client communication and document exchange with AES 256-bit encryption of data in transit and at rest. Role-based access to client/case information starting with the "zero trust" model is also a must.

Do you have the tools to build a strong virtual client relationship?

☐ Yes   ☐ No

Clients today have a variety of legal representation options. Offering an exceptional online client experience is a must to stay competitive. Secure client portals, web scheduling, 24/7 status updates, and digital document management enable you to provide the personalized service and security your clients need.

Do you offer electronic payment options?

☐ Yes   ☐ No

Electronic billing is changing the game with both law firms and their clientele. Web, email, and mobile payment options make it easy for clients to pay invoices, while emailed invoices and payment reminders can accelerate collections for your firm.

Integrate with common apps and platforms

Does your legal practice management solution integrate with other tools?

☐ Yes   ☐ No

Integration with popular platforms like QuickBooks, PCLaw, Office 365 and other tools reduces duplicated work and the need to jump between systems. Staff can work faster and deal with one shared database while simplifying workflows.

Does your software handle most or all the functions you need or are you patching together multiple platforms?

☐ Yes   ☐ No

A patchwork of different tools each designed for a different function is costly, overly complex, and ineffective. Look for a solution that is robust enough to deliver everything you need, such as calendaring, case management, email integration, accounting, document management, billing and time tracking, as well as secured, anywhere/anytime access.

Is your solution tailored to your needs?

☐ Yes   ☐ No

Depending on your practice area, size and budget, your law firm likely has some unique needs. Look for a solution that can tailor deployment options and deliver custom configurations and data migration in a way that solves your challenges. Look for a choice of private, public or hybrid cloud environments and on-premise options, and experts who can analyze your needs and design a customized bundle.

Your Score

0-3

If you said "Yes" to 3 or fewer of the above questions, your law firm probably lacks the collaboration and cloud capabilities to successfully navigate our new remote era. Trying to virtually manage a busy practice during the pandemic has no doubt proved a challenge, but you'll also likely face bigger roadblocks down the road when competing with the speed and client-centric service of tech-friendly law firms.

4-7

If you answered yes to about half the questions here, you are on your way to running an efficient, cloud-based law practice that appeals to both staff and clients. However, you may also lack some essential traits such as state-of-the-art security, instant payment processing or 24/7 access to information. You may have embraced some remote capabilities, but you may still deal with too many paper documents and your data may be at risk. With a few changes, you can improve your ability to protect your information, increase productivity and cultivate remote collaboration.

8-11

Your firm understands that remote capabilities are the key to being flexible, efficient and client focused. You have adapted to new modalities for attorney/client interaction and understand how to support staff and clientele in different locations. Just be sure you are using the right software to get the most ROI for your efforts. By staying current on new software innovations and compliance requirements, you can position your law practice for continued success.

Read our whitepaper - **The Road to Digital Transformation for Legal & Accounting Firms** - to discover four ways cloud tools can deliver higher protection and profit for your business.

About AbacusNext

With over 30 years of experience, AbacusNext is the leader in legal practice management software, payment processing and document automation. A suite of feature-rich solutions delivers calendaring, document and case management, email integration, time tracking, electronic billing and more, including world-class security and anywhere, anytime access to information. Modern law firms have the tools they need to achieve compliance, eliminate paper, reduce operational costs, and increase profitability – so they can focus on delivering exceptional client service.

Increase profitability and focus on delivering exceptional client service.

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