



DELIVERING STRATEGIC SOLUTIONS ACCA'S 2000 ANNUAL MEETING

Wednesday, October 4, 9:00am - 10:30am

Program 509 - Technology Tools for Small Law Departments

(Presented by ACCA's Small Law Departments Committee)

Program Description:

A panel of practitioners from small law departments will discuss trends in legal technology; use of technology to improve your practice and enhance inside and outside counsel relationships; practical experiences with intranets and extranets; and useful software, hardware, and peripherals.

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ACCA AM 2000 - Technology for Small Corporate Legal Departments — Program 509

Introduction — Expanding Your Technology Horizons

Whether you are a sole practitioner or practice in a larger department, you undoubtedly use technology in your practice. There are very few lawyers today who don't at least have a computer on their desk and know how to access the Internet and do basic word processing and e-mail. Almost everyone has voice mail these days, and Palm™ devices (www.palm.com) and other PDAs (personal digital assistants), such as Handspring's Visor™ (www.handspring.com) and the newer Pocket PC devices (www.pocketpc.com), seem to be in widespread use by lawyers. All of these tools are widely used throughout business today, so it isn't surprising to find that even lawyers in smaller departments have embraced them.

Judging from our survey of small law departments, however, most small departments have not progressed much beyond these relatively common technology tools. For example, legal-specific case and matter management systems have been on the market for more than ten years, and have proven that they can provide a significant improvement in efficiency and organization (in the case of some systems, at a very reasonable cost). Yet very few of our survey respondents reported using any kind of case or matter management or document management software. Intranets are becoming common in corporations, but sites maintained by small law departments do not yet seem to be widespread. Few respondents mentioned scanners as essential tools in their practices, leading to the not-surprising conclusion that the paperless office is still more myth than reality in the small legal department (as it is in most of the rest of the world). Not a single respondent mentioned using

not-surprising conclusion that the paperless office is still more myth than reality in the small legal department (as it is in most of the rest of the world). Not a single respondent mentioned using wireless e-mail — admittedly a relatively new development at the time of this writing.

This low level of technology adoption is understandable given the pressures on small law departments. Most of us are overworked and operate under budget constraints. We work with whatever the company standard hardware and software happens to be — and IT staffs tend not to consider the legal department their top priority. On top of all this, most of us don't have the time to research all of our technology options, even if we have the interest and the inclination. Part of the problem is that in many areas there are really too many options, and, unlike our colleagues in larger departments, most of us can't afford to hire expensive consultants to help us figure all of this out.

In the current state of legal technology, few standards have yet emerged. Whatever your opinion of Microsoft, one thing is clear. They have made the choice of word processing software for corporate legal departments very easy. Most corporations use Microsoft® Word as their standard, and it just doesn't make sense for the legal department to choose WordPerfect® or some other option, even if the lawyers and staff may have been more familiar with WordPerfect in an earlier life. Even if you don't think Word is the best word processing program, at least you're compatible with everyone else in the company, and your IT staff will support it. Most law firms have finally awakened to the fact that their systems need to be compatible with the systems their clients are using. Even if a firm still uses WordPerfect, it is likely they have become adept at translating formats so that their clients don't have to worry about it.

The situation for legal matter management systems is very different. Our survey results indicated that, of the relatively small number of departments that are using any kind of legal-specific matter management system (approximately 14% of survey respondents), no standard has yet emerged. Respondents mentioned that they used eleven different commercially available systems. A number of other respondents indicated that they use some type of internally developed system, typically based on Microsoft Access. Undoubtedly, a major reason for this situation is that there are so many choices and no well-known leader. The better-known companies that are addressing the legal market (e.g., Westlaw's coming WestWorks™ integrated research and practice management offering — www.westworks.com) tend to concentrate on the much larger law firm market. There are more than two dozen different matter management systems on the market. Although many of these systems are targeted only at the needs of law firms, there are quite a few that a corporate legal department might consider using. Making decisions even more difficult is the fact that new Internet-based systems will probably expand the number of options in the coming months and years. If there are that many matter management programs, and no consensus on which one is best, how can you possibly decide what to choose?

The first part of the answer is: You can't. No one can possibly look at this many options and make a completely informed decision about what is best for their particular department, particularly when the technology is changing so rapidly. The second part of the answer is: Stop worrying so much about it. See the article by Dennis Kennedy titled "The Best Is The Enemy Of The Good: Making Technology Choices," which is included in the program materials. The moral of this story is: If you wait until you are completely sure of your choices in the technology area, you will never accomplish anything. Without a standard to limit and guide our choices, the prospect of making decisions can be overwhelming. Unless and until a standard emerges, you will simply have to be comfortable taking some risks, and understand that you will make some mistakes along the way.

Luckily, there is a lot to be learned from mistakes and missteps. With some preparation, you should be able to make reasonable choices and avoid the most costly and time-consuming mistakes.

If you can accept that perfect decisions about technology are not possible, where do you start? Unfortunately, I have not yet discovered any publication or web site specifically directed to the needs of the corporate legal departments, let alone small law departments. While you should definitely take advantage of your corporate IT resources, the IT people are not likely to be of much help in choosing specific tools for a legal practice. Don't panic! We hope in this program to provide you with some guidance in thinking about technology and, we hope, some practical tips for choosing and using technology tools.

A Technology Agenda for a Small Corporate Legal Department

Establishing a logical agenda for technology adoption starts with an analysis of what you are trying to accomplish. Each department's needs and each lawyer's needs will differ, depending on the structure of the department, budget constraints, how much legal work is outsourced, where the lawyers are located, whether they travel extensively, what kind of practice areas need to be addressed, etc. The state of technology adoption and commitment in your company will also have an impact on your choices and what you are able to accomplish.

Don't feel you have to tackle everything at once. Although it is a good idea to have some kind of long-term technology plan or vision, taking incremental steps and achieving "quick wins" actually makes a lot of sense, given the rapidly changing state of technology today. As with the purchase of a computer, whatever you do will probably be obsolete in short order, but may be functional for several years.

Here are some possible goals, in no particular order:

1. Improve lawyer and department organization.
2. Improve work flow and processes.
3. Improve client service and communication.

3. [Improve client service and communication.](#)
4. [Share contact, calendar, and case information among lawyers.](#)
5. [Allow lawyers to access files and work effectively from remote locations, including home offices.](#)
6. [Integrate functions to the extent possible \(case/matter, contact, and calendar management, law firm billing, e-mail, voice mail, fax — Enter information only once, use as few different software packages and devices as possible.\)](#)
7. [Track the location of paper files. Stop spending time searching your offices for files.](#)
8. [Locate and reuse information, forms, research, historical information, etc. \(knowledge management\)](#)
9. [Standardize and automate production of documents and forms.](#)
10. [Improve relationships with outside counsel.](#)
11. [Store information on budgets, outside counsel costs, and expenses and generate management reports automatically \(e.g., budget, costs\). Use those reports to make decisions about staffing, litigation strategies, etc.](#)
12. [In all of this, keep in mind that we should be trying to make life easier, not harder, for clients, lawyers, and staff.](#)

[Given all this, what might be some logical next steps in the technology evolution? A sole practitioner or small legal department with a commitment to spending time learning how to use the tools can accomplish most of these goals with the following:](#)

1. [Laptop computers for all the lawyers;](#)
2. [Microsoft Outlook \(or whatever standard e-mail and calendar system your company uses\);](#)
3. [Microsoft Office;](#)
4. [Fax software;](#)
5. [Voice mail;](#)
6. [Internet access;](#)
7. [Scanners for each lawyer and support staff;](#)
8. [Palm devices \(and/or wireless e-mail devices\); and](#)
9. [Cell phones.](#)

[All of these tools are readily available and reasonably affordable. However, the next step, and one I consider almost essential, even for sole practitioners, is to make use of a matter management system specifically designed for attorneys. Can small law departments really benefit from matter management programs? While a well-organized sole practitioner may be able to get by without a specialized case and matter management program, there are many advantages to using a legal-specific system even for a one-lawyer department. As the number of lawyers and support staff gets larger, a matter management system becomes even more important.](#)

[Here are some of the reasons:](#)

1. [Even though a well-organized lawyer or department could theoretically develop an effective matter management system using general programs such as those found in Microsoft Office, few of us have the computer skills or the discipline to do this. A legal-specific matter management system will have much of the functionality you need already built in. The best ones will also feature at least some integration with other systems you use in your office, such as scanners, palm devices, and Microsoft Outlook or other contact and calendaring programs.](#)
2. [A primary benefit of these systems is that a centralized database of case/matter and contact information can be shared among lawyers and support staff. However, even sole practitioners can use a matter management system to become better organized and to ease the transition should the lawyer leave the company or should the department add additional lawyers or support staff.](#)
3. [With many systems, the vendor or third party consultants can provide documentation, training, and support in customizing the system to your needs.](#)
4. [Most systems will allow for remote use or remote access.](#)
5. [Most system vendors will have a commitment to improving the program over time — something you probably won't get with an internally developed system.](#)

[When you consider your investment in customization, training and information input \(which will probably far exceed the initial cost of the hardware and software\), even the purchase of an inexpensive software package represents a major investment. To a large extent, a software purchase such as this is a bet on the future of the vendor and the direction that vendor is taking, so it pays to have at least some understanding of the trends in legal technology as well as technology in general. At the end of this article is a discussion of some of the trends that may affect your technology choices. First, however, some considerations that should go into the selection of matter management software.](#)

Selection of Matter Management Software

[I wish I could report that there is one system that will do it all for a small legal department. However, that system doesn't yet seem to exist. Every system available today represents some tradeoffs](#)

I wish I could report that there is one system that will do it all for a small legal department. However, that system doesn't yet seem to exist. Every system available today represents some tradeoffs and compromises. Different lawyers and different departments will find some features more useful than others, and the choice of systems may come down to which offer the particular features that are important to you, not which system will do exactly what you want it to do. With that in mind, here are some important factors and questions to consider in selecting matter management software:

1. Process — Technology itself is not the goal, it is only a tool to help you achieve your goals. Think about what you want a system to do. Take the opportunity to reexamine your processes. Technology can be a tool to make your processes better. Don't simply adopt a matter management system to automate bad processes.
2. Integration — Most systems will handle basic case and contact information, and allow it to be shared among attorneys and staff, but you may want a program that integrates or synchronizes with Microsoft Outlook and palm devices so that information on contacts and calendars has to be entered in only one place. The ideal system will integrate with the e-mail system you use daily so that case-specific e-mails are automatically associated with the correct matter.
3. Wireless — Some systems now offer at least a degree of wireless access through devices such as the Blackberry™ and the Palm VII.
4. Paperless Office - If you want work toward a paperless (or at least a less-paper) office, you will want a program that allows you to easily scan paper documents and add them to the system. Your system should also allow you to receive and store faxes electronically, printing them out only as needed. You may also want the ability to include scanned photographs and video or audio clips, depending on the needs of your practice.
5. Documents — You should look for a system that includes document assembly, management, and searching, or a system that will integrate with your separate document systems.
6. Litigation — If your practice is primarily litigation, you may want a system that is specifically designed for litigation. Most matter management systems can be used to track litigation information, but they may lack the specificity of a litigation-oriented package. Since most corporate legal departments do not handle large volumes of litigation in-house, litigation systems are beyond the scope of this program.
7. Specificity — Is the system designed specifically for corporate counsel or is it primarily intended for attorneys in private practice? Many general systems can be customized and used successfully in a legal department, but you may sacrifice some functionality, such as the ability to generate useful reports.
8. Customization — How easy is the system to customize to your specific needs? Can the customization be done by the lawyers or support staff in your office, or is assistance from the vendor required?
9. Ease of Use — How easy is the program to use? Systems with lots of bells and whistles may seem impressive, but few people have the patience to learn how to use all of the features. A simpler, more intuitive system may be a better choice.
10. Access and Portability — How will users access the system? In today's world, you should probably assume that some kind of remote access will be necessary to allow the attorneys to access the system when they are working at home or on the road. If your lawyers are located in different locations, you probably want a system that will at least allow lawyers in multiple offices to share files and information. A fundamental question in today's world will be whether you want to be able to access the system over the Internet from wherever you may be located (requiring a phone connection until wireless Internet access becomes more common) or whether you want users to be able to work on their laptop computers or home computers while disconnected from both the corporate LAN and the Internet. Each type of system has advantages and disadvantages. More sophisticated systems may allow multiple means of access (e.g., users can work from any computer connected to the Internet, as well as offline on their laptops, which will synchronize over the Internet or the corporate network when a connection is available). Multiple access means are likely to be a trend of the future, although wireless Internet access may eventually make these considerations less important.
11. Security — How secure is the information on the system? Is the information located on individual PCs, on a corporate server, or on a remote server maintained by a third party. Are you comfortable with information kept on a system that is accessible over the Internet? Different vendors take different approaches to access and security. For example, many internet-based systems allow users to access the system with a username and password, using a browser from any computer connected to the Internet. Others require what is called a digital security certificate to be installed on a specific computer before the system will allow access. That means greater security at the expense of convenience — users must be using their own computer rather than any computer with a browser and an Internet connection. Keep in mind that most security experts are more concerned about internal security breaches than external threats, meaning that the most secure system might not be the one that resides on a computer or a server in your office. Your greatest threat might be from someone who has the most incentive and opportunity to hack your system — probably a disgruntled member of your corporate IT staff — rather than some random hacker out in cyberspace.
12. Users — How many people will be using the system? Where are they located? Besides the lawyers and legal support staff, you may want certain clients to have access to all or part of the information in the system. Some systems (typically referred to as extranet systems) also allow outside parties, such as outside counsel or experts, to have access to certain parts of the system or certain documents and to collaborate on-line. Systems that charge by the number of users may discourage use by such occasional users. Also, access by occasional users will be easier to implement on systems that do not require extensive training.
13. Cost — Systems range in price from a few hundred dollars per user to thousands of dollars. Some of the widely used less expensive systems that are used primarily by law firms may actually have some advantages over the programs designed for corporate legal departments. For example, programs such as Time Matters and Amicus Attorney have user bases in the tens of thousands, versus at most several hundred for most of the legal department-specific programs. The more users a program has, the more resources the vendor can devote to improving the program over time. Keep in mind the hidden costs of implementation and ownership. Some programs may require you to purchase hardware (e.g., a dedicated server) or other software. Costs for customization and training can also add up. If you want to import information from existing databases or systems that may entail additional costs. Ask the vendor or consultant about all of these costs.
14. Support — Who will provide support when you have problems or questions? Consider the level of corporate IT support available to you. Do you have access to a dedicated IT staff member

14. Support — Who will provide support when you have problems or questions? Consider the level of corporate IT support available to you. Do you have access to a dedicated IT staff member or is the legal department low on the IT priority list? If you choose a system that requires local administration, you will want to make sure you have the necessary support for a program that may be used by only your department. Most corporate IT staffs are not set up to support the specialized programs we are talking about. Systems provided over the Internet by application service providers (ASPs) should theoretically require much less local technical support.
15. Vendors — Who is the vendor? How long has the vendor been around? What kind of financial resources do they have? Will the vendor be able to keep up with changes in technology and keep improving the product? Check references. Make sure the references are actually using the product on a daily basis in a practice similar to yours.
16. Contracts and Licenses — What are you getting with your purchase? Many software products have an annual maintenance fee that covers technical support and routine upgrades. However, major upgrades may not be included. Will the vendor continue to support the product if you stop paying maintenance charges? Check your contract carefully and don't be afraid to ask for clarification or reasonable contract changes.
17. Electronic billing — Probably not yet ready for adoption by small law departments. Most of us will want to wait until systems become more standardized. Probably at least a year away, but it will come. Application service providers will eventually offer standardized systems that will make it easy for law firms and clients. Look for matter management systems to integrate electronic billing systems.
18. The Future — Try to anticipate possible changes and choose a system that will accommodate those changes. Do you anticipate adding lawyers or staff? Do you plan to allow lawyers or staff to telecommute? Although we all hope we will select a product that will work for us for many years, there are many reasons you might have to switch to a different system at some point in the future. Much of the investment in a system like this will be in the data that has been put into the system. Information stored in systems that use standard databases (SQL) will be much easier to export to a new system.

Specific Recommendations

What I have tried to provide below is a short list of interesting technologies that I am reasonably familiar with or that seem to offer an easy and/or inexpensive alternative to costlier systems. This is in no way intended to be a comprehensive list. By the time of the Annual Meeting in October, we hope to be in a position to provide specific information on available matter management systems and their features and benefits, as well as other technology options. See also the articles by Dennis Kennedy that are included in the program materials.

The advantage of some of the systems discussed here is that you can try many of these technologies at little or no cost. If you find they meet your needs, that's great. If not, using them will at least provide you with experience and give you a better basis for making more significant technology decisions, where the risks of making the wrong choice are greater.

Matter Management/Groupware

For the price, I don't think you can beat Time Matters' award-winning system (<http://www.timematters.com/>). Starting at \$150 per attorney, Time Matters offers great features for the price. Laptop users can work offline and later synchronize information. Although it is not designed specifically for corporate legal departments, it can be easily customized. A network of consultants and trainers is available to assist users. With more than 60,000 attorneys using the system (according to the company's web site), the company seems to have the resources to keep improving the product. Integration with other systems seems to be a high priority for the company. That large base of users also means that third parties have an incentive to integrate their software products with Time Matters.

Another inexpensive alternative that is popular among law firms is Amicus Attorney (<http://www.amicusattorney.com/>). The company claims that its software is used by more lawyers to manage their practices than any other software.

If you just want to get your feet wet in matter management software, check out one of these inexpensive systems. Some corporate legal departments do use these systems as their matter management systems. Although these systems will probably never achieve the specificity of a system designed specifically for corporate counsel, you may find that they meet your needs and that you don't need a more expensive system.

Pella Corporation's legal department uses a matter management program called Legal Files (<http://www.legalfiles.com>). Although the program is designed for law firms, we have been able to make it work fairly well for our needs. The primary reason we chose this program is its excellent data and document replication feature. This allows our attorneys to have a complete copy of our matter database, including all documents, on our laptops, and allows us to work away from the office without being connected to the company's network. We also use the synchronization feature with a contract lawyer who works from a home office. She connects to our server once or twice a day by phone to synchronize, and we all have access to the same matter and contact information. This synchronization could also be done over the Internet. The program also has a built-in document assembly and document management system, among other features.

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Web-Based Technologies — Extranets and Intranets

Web-Based Technologies — Extranets and Intranets

A common definition of an extranet is a private, secure place on the Internet, where authorized users can communicate and share information. That really isn't much different from an intranet. Both are like private versions of the Internet that can be accessed by authorized users through a browser such as Microsoft Internet Explorer or Netscape Navigator. Many commentators do not feel the distinction between intranets and extranets is very helpful, since the technology is basically the same and the same types of information and functions can be delivered over both intranets and extranets.

Extranets

It may be helpful to think of an extranet as an intranet that is made available to parties outside the enterprise. Extranets are being set up by corporations, by law firms, and by third party application service providers. Common applications include document storage and collaboration.

To get a taste for how extranets can work, try setting up and using a HotOffice® site (<http://www.hotoffice.com>). Although it bills itself as a web-based intranet service, it would be described by many as an extranet service, since anyone with Internet access and a user name and password can be given access to the site. Depending on whether you want to see advertising or not, the service is either free or very low cost. Although it is not designed specifically for lawyers, there is no reason lawyers cannot use the system. The HotOffice site claims that it has extensive security protections in place, but you should check with your corporate IT security people before entrusting privileged or confidential information to the site. Legal-specific, but more expensive alternatives include Niku's product (formerly LegalAnywhere) (www.niku.com), RecordsCenter (www.recordscenter.com), and DocumentForum - <http://www.documentforum.com>

Intranets

An effective legal department intranet site is a very useful service that in-house lawyers can provide to their clients. It can allow the lawyers to communicate more effectively, improve client service, make better use of their time, and focus on issues where they can add value rather than dealing with routine questions and requests. At this point I think its safe to say that if you don't have a legal department intranet site either up and running, or at least in the planning stage, you are in the minority. A story titled *GC's High (Tech) Priorities*, which appeared in the January 2000 issue of *Corporate Counsel* magazine, indicated that large legal departments are adopting technology like intranets and extranets at a rapid rate.

Apparently smaller departments are also getting on the bandwagon. Nearly 61% of our small law department survey respondents indicated that they either had a legal department intranet or were planning to develop one. Providing standard forms, compliance programs, and lawyer contact information were the features mentioned most. Of survey respondents who said they did not have an intranet for the legal department, most mentioned lack of time and lack of technical expertise as reasons. Some also mentioned a concern about keeping information up to date once a site is established.

The benefits of intranets in the corporate legal world are becoming well known. For the corporate legal department, an intranet can do such things as:

1. Provide information to in-house clients about:
 - a. The lawyers in the department
 - b. Outside lawyers used by the company
 - c. How to effectively work with inside and outside counsel
 - d. Legal issues and developments of interest to the clients
 - e. Resources of the legal department (e.g., library materials)
 - f. Corporate information (e.g., parent and subsidiary information, articles of incorporation, bylaws, minutes, etc.)
 - g. Links to useful Internet resources
2. Provide compliance training
3. Provide answers to frequently asked questions
4. Establish and/or enhance corporate compliance programs
5. Become the basis for a knowledge management system

6. [Be used for collaboration on projects, documents, litigation, etc.](#)
7. [Provide clients with access to standard forms, checklists, and instructions for their use](#)
8. [Provide information and reports on cases, projects, matters, costs, etc.](#)
9. [Provide access to policies and procedures](#)
10. [Integrate with systems provided by other vendors for specific tasks](#)

[Unfortunately, I do not believe there are any off-the-shelf intranet products for corporate legal departments. Although West and Lexis claim to have intranets that you can easily link to and incorporate into your corporate intranet, their products \(not surprisingly\) seem to be targeted as users with a need for legal research — in other words, primarily lawyers and legal assistants. Most legal departments, on the other hand, want to have a site for their clients to use — something that West and Lexis don't seem to be providing. That means that whatever you do will have to be custom built for your needs. That doesn't necessarily mean a large investment, however, and it doesn't mean the project has to be overwhelming. Here are some suggestions for getting started:](#)

1. [As with any other project, spend some time thinking about what you want to accomplish. Think about what kinds of information would be most useful for your clients, and can be provided with a minimum of effort. Focusing first on things like lawyer contact and biography information and standard forms are an easy way to get started.](#)
2. [Think about how you want your site to be organized. Think about what you like and don't like in web pages you visit. For example, it's usually better to break a long article up into smaller pages with links to the previous and next pages rather than having one large page that users have to scroll through. Keep it simple! Fancy graphics aren't necessary and can even be a distraction.](#)
3. [Products like Microsoft FrontPage make it easy to produce web pages without knowing much about the technology. \(Although many people say that learning enough about HTML coding to produce basic web pages isn't terribly difficult, it's certainly not necessary.\)](#)
4. [You don't necessarily have to develop all of the content for your site yourself. Providing links to web sites with useful content is an easy way to get substantive information into your site. Law firms and government agencies provide a lot of very good information on line for free. For example, you could provide a link to the EEOC's home page \(\[www.eeoc.gov\]\(http://www.eeoc.gov\)\). While it is easy to copy information from web sites, linking has a couple of advantages. First, particularly if it is a government agency or a law firm, you can at least hope that they will do a better job of keeping the information up to date than you could. Second, linking should avoid any potential copyright infringement problems that could arise from simply copying the information and putting it on your site.](#)
5. [Look at ACCA's Virtual Library \(\[www.acca.com\]\(http://www.acca.com\)\) for articles and forms that you might be able to use. ACCA's Small Law Departments Committee hopes to redesign its site to provide more useful links and even sample pages that you could put onto your site.](#)
6. [Make friends with people in your IT department who can help you when you need help.](#)
7. [Hire a law student to help develop your site. Most students these days are pretty adept at learning and using computer programs. If you are lucky enough to find one who is a good writer and has some technical skills it can be an easy way for you to get your site built and a great learning experience for the student.](#)
8. [Once you have some content up on the site, ask a few people to look at it and give you suggestions. While you may think the site you've just developed is the greatest thing since the invention of Velcro®, you may be surprised when you get feedback from others who have trouble navigating it or who can't figure out how to download a form.](#)

After you have your site up and running, don't think people will just come to it. You probably will need to do some marketing. Make sure you have something that will make people want to come back. Keep the information up to date. Assign someone to periodically review and update each page on the site. Consider a regular e-mail newsletter to let clients know about current legal developments and new features on the intranet (be sure to include a "clickable" link to the site in your e-mail). The idea is to have enough on the site to keep people coming back.

Other Internet Services

Everyone has his or her own favorite Internet resources. One of my favorites is uReach (www.ureach.com). [You can get your own personal contact manager, voice mail and fax number, a personalized e-mail address, store files, share information, and much more. Retrieves e-mail from other \(POP3\) e-mail systems. There are other similar services, but uReach offers more than most of them. Downside: doesn't synchronize with palm devices — yet.\) Anyday.com \(now owned by Palm, Inc.\) provides calendar and contact, plus synchronization with personal information managers and palm devices.](#)

Gadgets

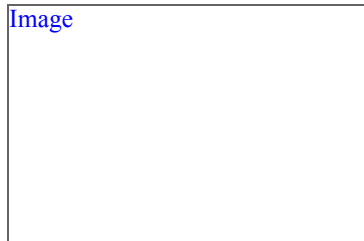
PDA's

[Check out Dennis Kennedy's articles on PDA's that are included in the materials for information on personal digital assistants.](#)

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Wireless E-mail

["If you want to go the distance on the road with constant e-mail access, consider **Research in Motion's BlackBerry Wireless Handheld \(model 950\)**. The \\$399 pager-esque device lets you send and receive e-mail, check your calendar, or \(for an additional \\$40 per month\) surf the Web--all remotely. The screen is small, but a QWERTY keyboard and lightweight construction make this unique device functional." — PC World.](#)



A number of law firms are giving their attorneys BlackBerry handhelds to allow them to stay connected while out of the office. Other iterations of Research in Motion's (RIM) devices are used by such services as the [eLink Wireless Email Service from Motient \(http://www.motient.com\)](http://www.motient.com) — "the power of email, the portability of a pager, and the functionality of an organizer, all in the palm of your hand." The Motient offering integrates contacts, calendar, etc., providing much of the functionality of a palm device.

[Motorola offers similar devices \(see www.motorola.com/General/index.html\).](http://www.motorola.com/General/index.html)

Advantages of RIM devices:

1. [Small and lightweight.](#)
2. [Great for keeping in touch and short messages](#)
3. [Can be used to communicate in places where cell phone conversations would not be allowed or appropriate \(e.g., meetings, courtrooms\)](#)
4. [Some versions include organizer software that will synchronize with personal information manager software \(such as Microsoft Outlook\), making it feasible to use it as a substitute for many of the functions of a palm device](#)

Disadvantages:

1. [Small keyboard](#)
2. [Small display \(but better than a lot of cell phone displays\)](#)
3. [Longer e-mails require additional steps to download entire message](#)
4. [Cannot handle e-mail attachments](#)
5. [Access limited to major metropolitan areas — can be spotty even in covered areas.](#)

Small-Scale Scanners and Copiers

[Converting paper to an electronic form requires some type of scanner. To scan a large number of pages or documents, you will either want to outsource the project or get a suitable scanner with sheet-feed capabilities. If you just want to scan a few pages at your desk or on the road, however, the following devices are quite useful.](#)

1. [HP CapShare Portable Copier \(www.capshare.hp.com\)](http://www.capshare.hp.com). With this device, which is about the size of a paperback book, you can store up to 50 pages of text, and send the images to a computer, printer, or PDA. No color, but included software to save files in Adobe PDF as well as TIFF format is a nice plus. \$299
2. [Abera NoteTaker 868C portable copier. www.abera-tech.com](http://www.abera-tech.com). Similar concept to the CapShare, but also captures color images at up to 300 dpi. \$299. Saves copies in JPEG or BMP.
3. [Attaché Mobile Scanner, Antec, Inc. \(www.antec-inc.com/product/pc_card/attache.html\)](http://www.antec-inc.com/product/pc_card/attache.html) — Extremely lightweight portable sheet fed scanner for use with laptops. \$129.95
4. [Visioneer Paperport Strobe Pro Scanner \(www.visioneer.com\)](http://www.visioneer.com) — Compact sheet fed scanner is among the quickest of scanners. Not as portable as the others, but a nice unit. About \$200. Includes Visioneer PaperPort Deluxe and TextBridge Pro 8 OCR software.

What do we need to know about the future?

Although lawyers, as a group, tend to be relatively slow to adopt new technology, there is no question that technology will continue to fundamentally change the way we all live and work, including the practice of law. In fact, lawyers and non-lawyers (and even some automated Internet-based systems) are already offering legal services over the Internet, and vendors are trying to convince corporate counsel that an on-line marketplace is the new way to select outside counsel (e.g., www.eLawForm.com, and similar services planned by ELF Technologies (www.serengetius.com) and IbidLaw.com). Whether or not we can agree that these trends are positive for our profession, we all need to understand what technology can do to improve the way we practice law.

Obviously, we cannot hope to predict the future with any degree of certainty. However, it is useful to examine some of the important trends that we can foresee, because they can help guide our present technology choices. Here are what I see as some of the most important trends that need to be considered as you think about choices and investments in technology. Not surprisingly, the common themes are the Internet and integration.

1. Once lawyers get over their concerns about security (it wasn't that long ago that many lawyers worried about the security of e-mail — a concern that seems to have faded as e-mail has become ubiquitous, but which will probably rise again once encryption programs become easier to use), more information and applications, including case, matter, and document management systems, will be available over the Internet, and will not reside on your computer. Whether these applications reside on your company's own servers or on the servers of a third-party application service provider (ASP) will become less important.
2. The Internet will become much more important as a place to store and access documents for transactions and litigation. With some limitations, the Internet allows people to access information and applications from wherever they happen to be and whenever they want to get to them, allowing new ways of working with clients, outside counsel, and other team members. This technology is already available, but will continue to evolve. Before long you may be able to sit at your desk and watch or even take part in a deposition taking place in a remote city over the Internet. That service is already available (see <http://www.i-dep.com>).
3. Personal information managers (PIMs) and e-mail systems such as Microsoft Outlook and Lotus Notes that are currently located on PCs and corporate servers will disappear in favor of web-based systems. These new systems will be designed to integrate better with hand-held devices and matter management systems.
4. As wireless Internet access becomes more widely available and affordable, many of the current limitations of Internet-based systems (e.g., the need to have access to a network connection or phone line) will become less important.
5. Handheld devices (which people love for their "instant-on" feature if nothing else) will become more sophisticated, probably replacing most of the functions of current laptops within a fairly short time. Web sites will be designed with smaller devices and smaller screens in mind to accommodate these Internet devices.
6. More devices will be able to communicate with each other wirelessly and automatically, greatly simplifying such tasks as synchronizing information between cell phones and handheld computers. Integration with web-based contact and calendar systems will become commonplace. Theoretically all of this will greatly simplify the use of technology and allow us to choose specific technology tools for our needs without worrying about problems such as: If I buy a new cell phone, how do I get all of my contact names and numbers into the thing without spending an hour or more punching little buttons and squinting at that tiny screen?
7. Today, except perhaps for some custom systems, there is no one system that does it all. Integration of systems will be a major push. E-mail, voice mail and faxes can already be received, accessed and stored in a single system over the Internet at a very low cost (e.g., www.ureach.com). Once a vendor integrates this type of service with a comprehensive matter management and document management system, they will have a tremendous advantage. The goal will be to create one system that looks to the user as though it does it all, although the information and applications may actually come from multiple providers and reside on multiple servers. The Internet will allow this kind of seamless integration.
8. Less agile and less well-funded legal technology vendors will find it harder and harder to integrate all this new technology into their systems. Their systems will fall out of favor, possibly losing out to new entrants who tailor more general (not legal-specific) web-based systems to the needs of legal professionals. Unfortunately, the vendor you choose today may not be around in five years. Tip: Systems that use standardized databases (SQL) will ease the transition from an old system to a new system when the need to change systems arrives.
9. Certain services that today are relatively difficult and/or expensive to use will become standardized, will be integrated into more matter management systems, and will become easy to use. As an example, unless you have a huge number of invoices to process, it may pay to wait until electronic billing services become more widely available before jumping in.
10. Compared to PC and server-based systems, most Internet-based systems will have the advantage of simplicity at the expense of some functionality. For most small corporate legal departments that will be a fair tradeoff. Most of us will be better off with systems that are easy to learn and use, even if they lack some features and extensive customization options.
11. Extranets (essentially a private intranet that is available over the Internet to anyone with the a user name and password) theoretically offer tremendous potential for collaboration. Extranets also offer the potential to improve efficiency by eliminating duplicate filing systems (by giving outside counsel, inside counsel, clients, and support staff access to one set of electronically stored information). However, but their potential will not be realized until they become more standardized and integrated into other systems, such as personal information managers, matter management, and document management systems Today, extranet systems may be designed and maintained by a law firm, a corporation or a third-party provider. They may be stand-alone systems or they may be a function available in a matter or document management system. Each system looks different and works differently. Even the simplest system will require some user training and the establishment of rules and standards to guide users and avoid system chaos. Think of the difficulty of working with twenty different law firms that have set up twenty different extranet systems for you to use. On the other hand, law firms face a potentially greater problem if many of their clients set up their own extranets and expect their law firms to learn their systems. There are efforts underway toward standardization, but that is probably a long way off.

Final Note:

I hope I have provided some useful information here. I also hope that it is not terribly out of date by the time of the annual meeting in October. We will try to make more information and updated information available at the meeting.

The materials that follow are several articles we have selected from Dennis Kennedy's excellent Internet site. His articles cover many of the topics we had promised to cover in this program and using them saved me a lot of work, for which I am extremely grateful.

Please feel free to send questions, suggestions, or comments to our Small Law Department Committee's uReach site at accasld@ureach.com.

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[July 21, 2000](#)

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