

Vetting Tech for Your Law Firm: Practical Tips



MASS LOMAP

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Selecting What is Right for Your Firm

**Dazed and
Confused?**



Research

- Beware of the pay to play listings like the ABA Legal Technology Buyer's Guide and ABA Blueprint
- Blogs: Law Technology Today (ABA LTRC), Attorney at Work
- CLE and Conferences: VSB Techshow, ABA TECHSHOW



Research

- **Podcasts:** Jim Calloway and Sharon Nelson's The Digital Edge, Kennedy-Mighell Report
- **Surveys:** ABA Legal Technology Survey Report (expensive, but use the free summaries)
- **Organizations:** ILTA



Research

- **Practice Management Advisors**
- **Magazines:** Law Practice Magazine and Law Practice Today E-zine



Use **Business-** Grade Tech



**EXPO Halls: A
Great Place to Ask
Questions and
Test Drive
(Welcome to the
return of expo
halls soon!)**



Which do you need?



Technology Challenges

- Change management still hard
- Resistance of firm management
- Costs in money and time to install, configure and train



**Vendor
Websites and
Materials – be
very wary!**



Signing up for free vendor white papers/reports?
Not always a good idea



References from Vendors





Trusted Colleagues



TRY

BEFORE YOU

BUY

2021 EDITION

MODEL RULES OF PROFESSIONAL CONDUCT



ABA
AMERICAN BAR ASSOCIATION
Center for Professional
Responsibility

- Rule 1.1 Competence (risks and benefits associated with technology)
- Rule 1.6 Confidentiality (reasonable efforts)

If you think
compliance is
expensive, try
non-compliance





**Even the best tech
won't make you
100% secure**



You cannot “set it and forget it”

Should you upgrade to Windows 11 OS?

- Hardware requirements
- TPM 2.0
- Run Android apps
- Free
- Application compatibility
- Staged rollout
- Completion mid-2022
- Delay upgrade?



Microsoft 365



- Microsoft 365 – a HUGE hit with lawyers!!! Vast majority of lawyers now using it. What version do you need?

Microsoft 365 – install it and it will work, but much more is required to secure it! – Microsoft Secure Score

Microsoft Secure Score

Score last calculated 04/28 ; 5:00 PM

[Overview](#) [Improvement actions](#) [History](#) [Metrics & trends](#)

Microsoft Secure Score is a representation of your organization's security posture, and your opportunity to improve it.

Applied filters:

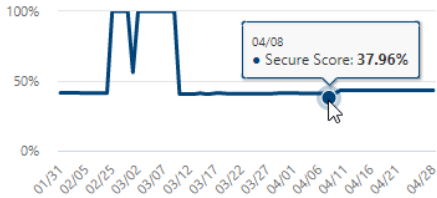
[Filter](#)

Your secure score

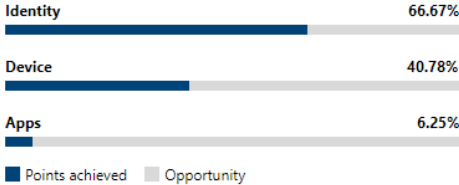
Include

Secure Score: 43.3%

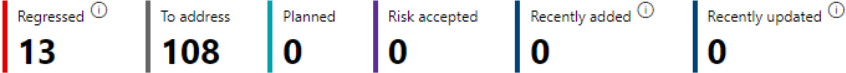
411.83/951 points achieved



Breakdown points by: Category



Actions to review

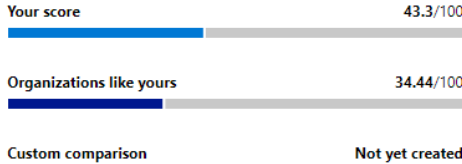


Top improvement actions

Improvement action	Score impact	Status	Category
Require MFA for administrative roles	+1.05%	To address	Identity
Block Office applications from injecting code into other processes	+0.95%	To address	Device
Block Win32 API calls from Office macros	+0.95%	To address	Device
Block Office communication application from creating child proc...	+0.95%	To address	Device
Block executable content from email client and webmail	+0.95%	To address	Device
Block credential stealing from the Windows local security autori...	+0.95%	To address	Device
Block persistence through WMI event subscription	+0.95%	To address	Device
Use advanced protection against ransomware	+0.95%	To address	Device

[View all](#)

Comparison



[Manage comparisons](#)

History

Apr 26 2021 11:13 PM

User marked 'Require MFA for administrative roles' as to address

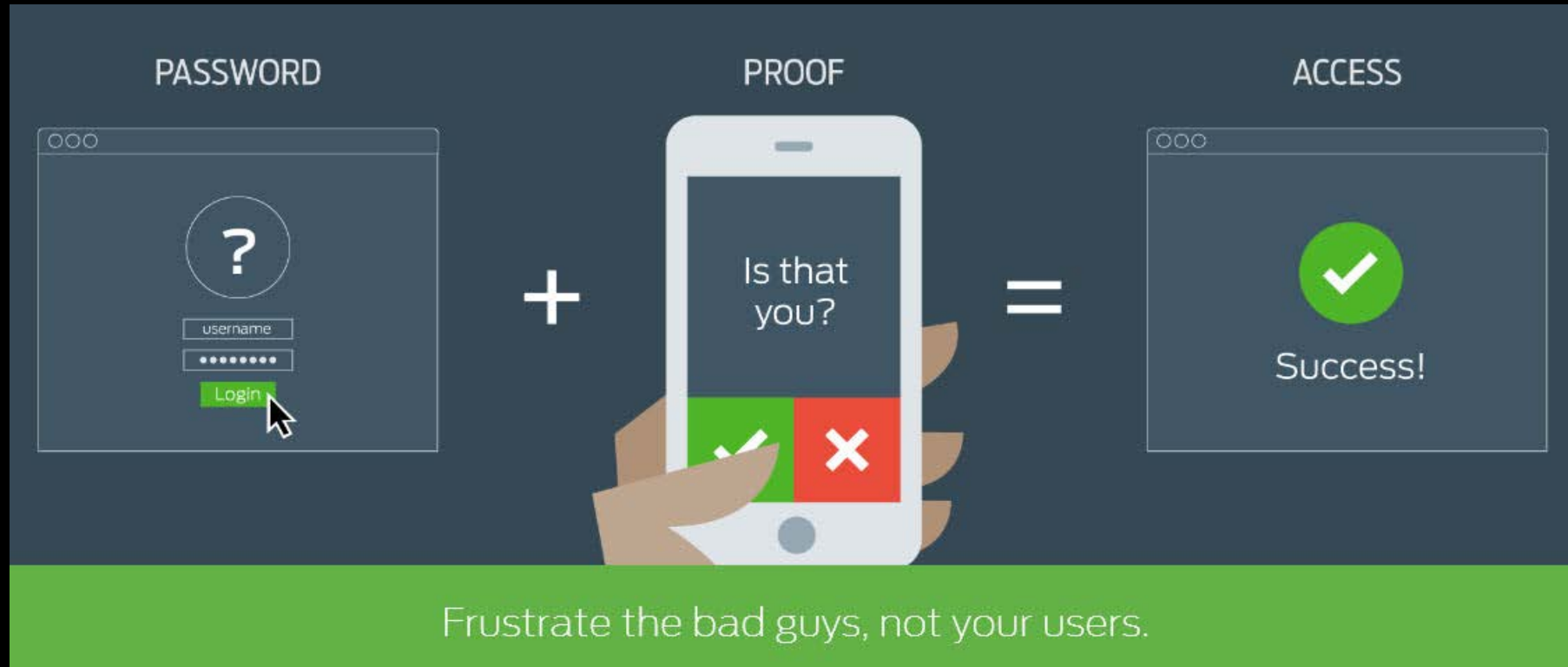
Resources

[Read about Secure Score capabilities](#)

Messages from Microsoft

Get the inside scoop from Microsoft Security.

Multifactor Authentication



Microsoft: Using multi-factor authentication blocks 99.9% of account hacks

Microsoft cloud services are seeing 300 million fraudulent sign-in attempts every day. MFA can help protect accounts against many types of account takeover attacks.



By Catalin Cimpanu for Zero Day | August 27, 2019 -- 04:30 GMT (21:30 PDT) | Topic: Security

**Duo
Security**

The most secure way to use 2FA?

- #4 Have code texted to phone, (can be intercepted using SIM swapping or tricking you into entering the code on a false logon screen) **LEAST SECURE** (but way better than nothing!)
- #3 Use an authentication app (generates a new code every 30 seconds)
- #2 Use push notifications, which you can simply accept
- #1 Use a hardware token **MOST SECURE**



Most popular phones for lawyers – and their **security**

- iPhone
- Android
- Others are rare



Case Management

Clio

Rocket Matter

Smokeball

MyCase

CosmoLex

Client portals –
rapid adoption
since COVID

Clio, Rocket
Matter,
MyCase



Time and Billing/Online Payments

- Timeslips
- Tabs3 (CosmoLex)
- PCLaw
- Bill4Time
- Chrometa



LAWPAY[®]
AN AFFINIPAY SOLUTION

ClientCredit

Document Management

The logo for Worldox, featuring a green circle with a white 'W' inside, followed by the word 'Worldox' in a blue, sans-serif font. The logo is set against a white rectangular background.

Worldox®

The logo for netdocuments, featuring the word 'netdocuments' in a blue, sans-serif font. The logo is set against a white rectangular background.

netdocuments®



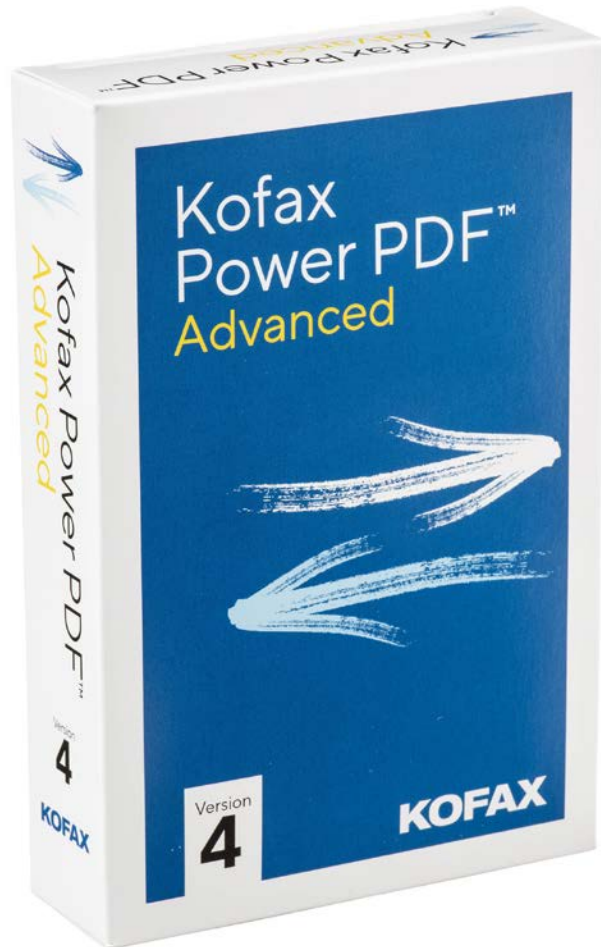
Adobe Acrobat DC



Acrobat DC Pro



Power PDF – Acrobat Alternative



- Power PDF Advanced alternative to Acrobat Pro
- Bates stamping
- Redaction
- Encryption
- Cloud-integration
- 30-day money back guarantee
- \$179

Foxit PDF Editor Pro – Acrobat Alternative



- PDF Editor Pro alternative to Acrobat Pro
- Bates stamping
- Redaction
- Encryption
- Cloud-integration
- Free add-ons
- 14 day free trial
- \$179

Automated PDF forms – for engagement letters

ENGAGEMENT LETTER AND RETAINER AGREEMENT

BETWEEN: **Smith Law, LLP**
123 S Main
Los Angeles, CA 90293
Solicitors

AND: **Jane Doe** (referred to in this Agreement as the "Client")
199 Montana Blvd
Santa Monica, CA 90245

Re: Corporate and Commercial Matters

All corporate and commercial legal matters handled by our law firm on behalf of the Client including those instructed by the Client or any director or officer of the Client from time to time; All advice in relation to the Client and its business and legal matters; All contracts, security agreements, negotiations, joint venture contracts, proposals and other obligations of the Client including advising, meetings, drafting and attending on execution of documents, all court, administrative body or other proceedings and representation of the Client and any or all of the persons, who represent the Client's interests, including all hearings, examinations for discovery, trials, research, advising, instituting proceedings, prosecuting proceedings and all legal representation related thereto; All travel, meetings attendances and other services in relation to the foregoing.

We are pleased to confirm you have engaged our law firm to act for the Client on the above-noted matters. Thank you for the confidence that you have shown in engaging us. We accept the engagement and we take your trust very seriously. Our *goal* as the Client's lawyers will be: *to provide effective legal services to the*



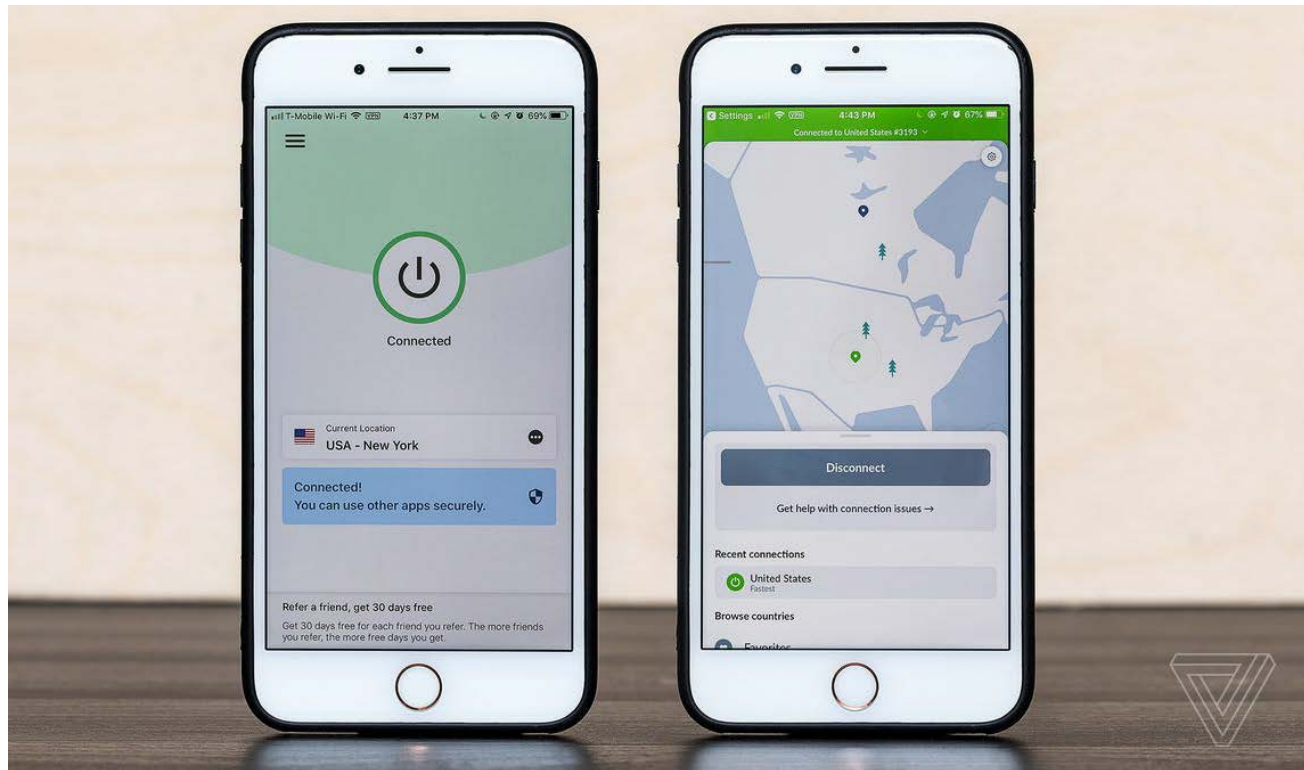
Electronic signatures/electronic contracts

DocuSign, Adobe Sign



Videoconferencing is here to stay!

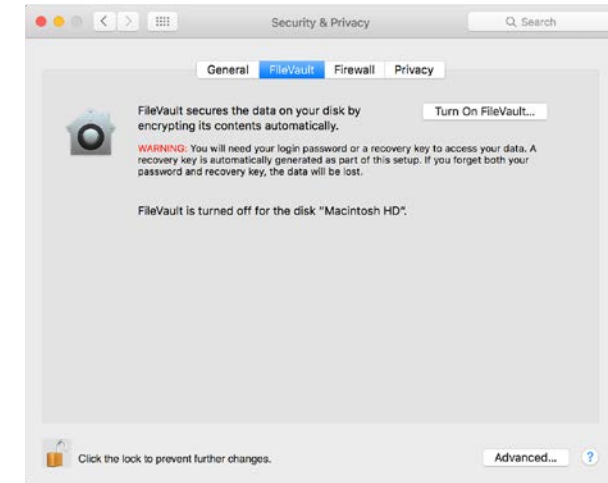
Secure remote access – Encrypted transmission



- ExpressVPN (annual fee: \$99.95)
- NordVPN (\$11.95/month)
- Terminal Server
- Citrix
- LogMeIn
- GoToMyPC
- Control

Encryption Software

SafeGuard
Device Encryption



Password Managers

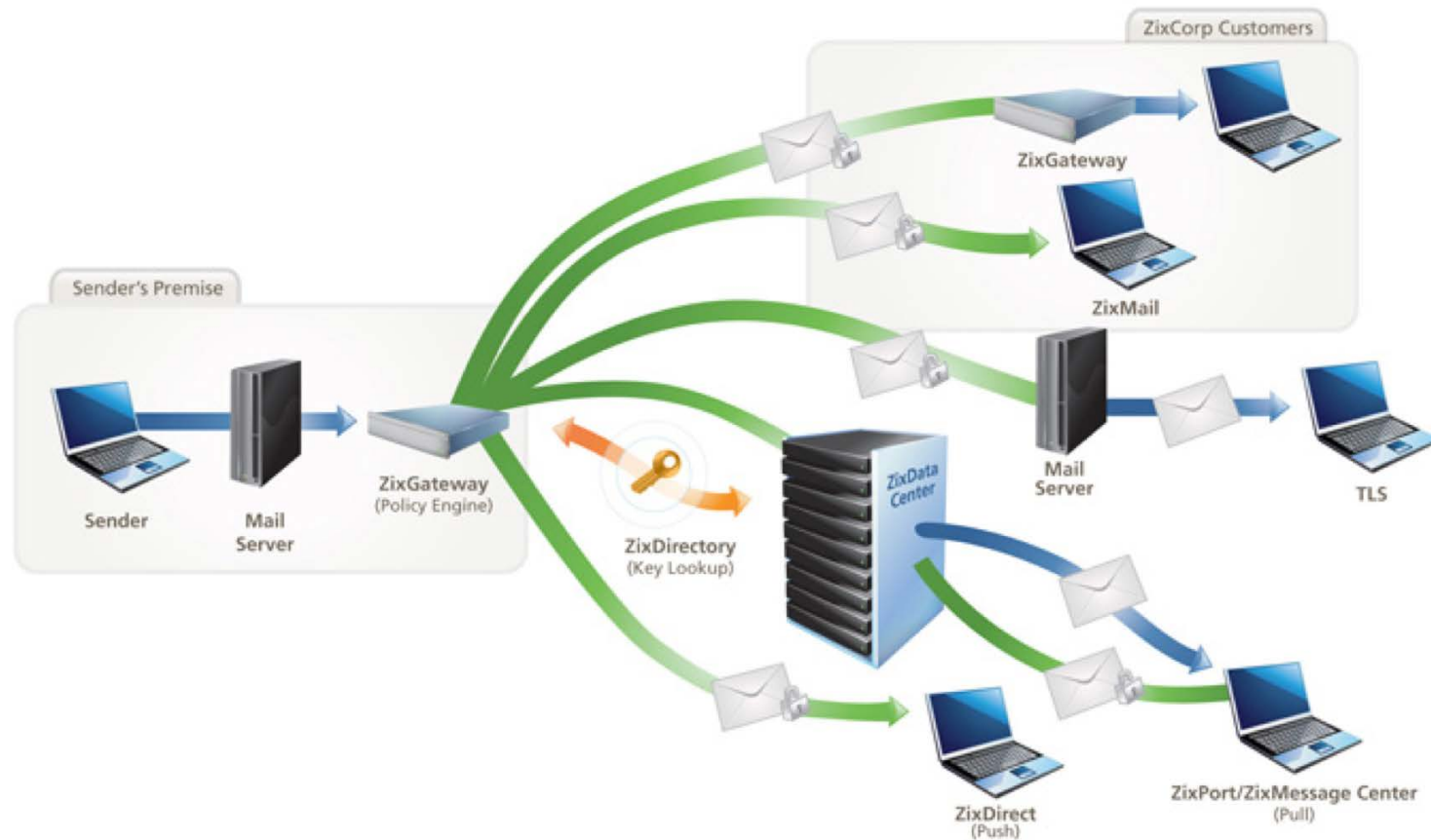


- LastPass – free/premium version \$36 a year, multi-platform
- eWallet - \$19.99, \$9.99 for mobile platforms
- Keeper – Free, \$29.99 per year (sync multiple devices)
- 1Password - \$2.99/month, family plan \$4.99/month
- Dashlane – Free, \$59.99 per year (sync multiple devices)
- PC Magazine – best password managers - 2022:
<https://www.pcmag.com/roundup/300318/the-best-password-managers>

**Cisco Meraki –
from several
hundred
dollars a year,
Palo Alto
Networks for
larger firms**



Encrypted Email



- Proofpoint
- Mimecast
- Microsoft 365
- Sophos
- HP SecureMail
- Trend Micro
- Symantec
- Citrix ShareFile

Wi-Fi Router Encryption



- WEP (Compromised)
- WPA (Compromised)
- WPA2
(Compromised but patched)
- WPA3



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