

# **Ways Solo Practitioners and Small Firms Can Level Up Their Legal Technology**

Legal technology can measurably improve the way attorneys practice law, raising both the quality of services they provide to clients and their own quality of life.

Yet the majority of lawyers practice in small firms or as solo practitioners, and most of those practices lag behind on implementing new legal technologies. From administrative tools like client intake and billing automation to functional tools like document assembly systems, useful technologies have often hovered just out of reach for small practices — which means most lawyers and their clients aren't benefiting from them.

## **Obstacles to Technology Adoption by Small Firms**

In its 2018 Legal Technology Survey Report, the American Bar Association's Legal Technology Resource Center reported that 59 percent of respondents practiced in firms with fewer than 10 attorneys. These lawyers reported a steady increase in the use of cloud technology for work-related tasks: 59 percent of solos and 58 percent of lawyers in firms of 2 to 9. The use of practice management software among these lawyers seems to have plateaued at 30 to 35 percent. As for functional tools, unfortunately, most do not regularly use document assembly software, which can make document drafting faster, easier, more consistent and

error-free. Only 44 percent of solo practitioners and 47 percent of small firm attorneys had access to document assembly software, and fewer yet — 34 and 30 percent, respectively — reported actually using those programs.

Small practices have a host of reasons for their lack of technology. They may have less money for purchasing new software and limited (or nonexistent) IT staff to share the load of implementation and maintenance. They're also pressed for time, making it difficult to step back and evaluate what repetitive tasks are wasting their time. Plus, solo and small firm lawyers have neither the bandwidth to tolerate disruptions to their established processes nor anyone who can pick up the slack while they onboard a new technology tool.

Nor do the obstacles end there. Many legal technology applications have been designed — and priced — for a completely different audience. Those sophisticated tools are disproportionate to a small firm's infrastructure, staffing and budget.

What should lawyers in small practices be looking for?

### Characteristics of Good Technology for Small Firms

To counter the obstacles, solo practitioners and small firm lawyers need tools that are useful in common workflows like client intake, case management, document drafting and client communications. As Nicole Black put it, most lawyers don't need fancy bells and whistles; they need "software tools that are appropriate to the tasks the lawyer needs to accomplish daily." Those tools should provide substantial and immediately demonstrable savings in time, money or both.

To work in a small firm environment with minimal resources, technology must also be:

- Affordable
- Easily integrated with existing systems like Office 365 or e-billing software
- Intuitive, so users require little training
- Easy to set up
- Low-maintenance

Lawyers should look for tools that can minimize administrative burdens, reduce the time spent on repetitive and low-value tasks, and increase quality and consistency of results without requiring them to expend more time or effort.

### How Small Firms Benefit From Adopting Legal Technology

It's unfortunate that lawyers in solo practices and small firms sometimes lag in technology because they acutely benefit from its use. Technology can help lawyers complete legal research more quickly and thoroughly, draft contracts more efficiently, automate billing, and improve client communications through the use of tools such as web-based client information portals.

When you're on your own and don't have a junior partner to help with tasks, these benefits are huge.

What's more, the process improvements can, unsurprisingly, improve client results and lead to greater client satisfaction. That provides a competitive advantage over firms that still do everything the traditional, labor-intensive way. In some cases, technology levels the playing field, enabling small tech-savvy firms to compete with larger firms.

Improving efficiency with modern tools also boosts job satisfaction. Work-life balance is much more attainable when your firm supports you with tools that make your job easier.

Plus, technological competence is an ethical requirement in 36 states, at last count.

### Do This Now

To level up your technology, take these steps.

- **Use what you have.** Verify that you're getting the most from your existing technology. Spend 15 or 20 minutes with each product that you've invested in to determine whether it can handle additional tasks you're still doing manually. While you're at it, make sure your installed versions are up-to-date and fully patched.
- **Run a technology audit.** List the recurring tasks your firm's lawyers and support staff must do and correlate them with the technology you're using. Look for obvious gaps in workflow coverage and prioritize these areas when considering new purchases.
- **Survey your employees about their biggest time-wasters.** What are their most annoying repetitive tasks? You may be

able to address at least one such task — to everyone’s relief—with a new application.

Tremendous benefits are available to those small firms and solo practitioners who push through the obstacles and upgrade their technology. Will you be among them?

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