



Software as a Service

Running My Lawfirm on the Cloud!

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My practice

- Business Immigration law – Japanese & German clients
 - Fixed fee practice – not hourly rate
 - Many similar cases – effectively using previous work critical to profitability
 - Seasonal – key type of visa usually only available from April – June. 40 – 50% of revenue comes in these 3 months
 - Attorney's and staff must be skilled and well trained in law & technology
- Two attorneys and two paralegals on staff
- Japanese & German paralegals outside New York & work with Japanese & German attorneys in US and abroad
- In December 2008 migrated all data to Microsoft's Online System

Why Did I Shift to the “Cloud”

- Better performance
- Reduce costs
- Effectively use outside attorneys & staff
- Increase value of practice to sell or merge

Better performance

- Access Information More Effectively
 - Outlook e-mail, tasks, calendar
 - Client files
- No more VPN worry.
- Using my Windows Mobile 6.x PDA I can synchronize my e-mail, calendar, and tasks much better than under old system.
- Could do with server, but less reliable because of unreliability of VPN connection

Better performance

- Assign attorneys & staff tasks more efficiently
- Example
 - Assign assistant to work on letters
 - Create template and save on folder in “cloud”
 - Send link to folder via Outlook as a task
 - She can find the template, save it as new document, finish it, and complete the task in Outlook which automatically notifies me the assignment is done
- Both of us are using stand alone computers!
- Could have been done with server, but more complicated

Better performance

- Work with attorney's, staff, and clients
- Microsoft's Online Services includes LiveMeeting
- Example
 - Send an invitation to appropriate parties through Outlook to attend a LiveMeeting
 - In the invitation is a link which they will click on at the time of the meeting
 - You can then share your desktop and review documents together at the same time.
 - There are other similar programs, but this is included in the monthly fee and works quite well.

Better performance

- **Access information without going to “storage”**
- Example
 - Client calls and wants copy of approval notice 3 years ago
 - While we are on the phone I e-mail her a copy!
- Client is delighted & more likely to use us in the future.
- I don't have to use much non-billable time.
- Could have been done with server, but more complicated

Better performance

- **Re-use similar cases**

- **Example**

- New client wants H-1B visa for graphic designer
- I remember I did similar case 3 years ago
- Find old case and revised letters and evidence in ¼ the time to create from scratch!

- Client is delighted because case is filed so fast

- I am happy because case is more profitable.

- Could have been done with server, but more complicated

Better performance

- **Data is automatically backed up**
- Example
 - “Did the backup work last night?”
 - What if there is a fire or another September 11th attack
- Had two USB backup’s & should be rotated every week but I forget.
- With data in Cloud I don’t have to worry.

Better performance

- **What if the server breaks?**
- This was my biggest nightmare
 - Happened once & took about a week to get new server running
 - Can't buy new server at Radio Shack & get it going quickly
 - Good backup doesn't help if no server to restore to
 - Very expensive for IT staff with over time and weekend work.
- If server went down in my busy season I'm out of business
- With data in Cloud I don't have to worry.

Reduced Cost

- **Reduced Rent by 50%**
- Had two servers and they were loud, hot, and big
- Wanted to move to smaller space to save money, but couldn't if I had to keep servers
- After moved data to Cloud we only have stand alone PC's in the office and moved to better office at 50% of the rent

Reduced Cost

- **Reduced IT costs by 90%**
- After the migration I realized almost all our IT costs involved the server, including:
 - The server wasn't running
 - We couldn't connect to the server in the office
 - The outside attorney's and staff couldn't connect
 - We couldn't add new people to our system
- We just don't have these troubles now & things just work now and we can add people easily

Reduced Cost

- **Reduced IT costs by 90%**
- When we have trouble, Microsoft's free technical support is very good and easy to use.

Reduced Cost

- **Much lower up-front costs**
- Servers are expensive:
 - The computers have to be more robust & expensive
 - Microsoft Small Business Server is expensive
 - IT costs to get everything running and everyone connected is high
 - Software upgrades are important, but expensive
- With the cloud the monthly fee covers all this.

Reduced Cost

- **Much lower long-term costs**
- Every 3 or 4 years need to replace the servers & you have similar costs again
- With the cloud this problem doesn't exist
- My only cost is to buy new stand along computers which are much cheaper than servers

Use outside attorneys & staff

- **The seasonable nature of my practice makes this essential to my business**
- I need to have skilled people work with me easily and cheaply
- With the cloud this works as if they were in the office. They work exactly the same way we do using standard Microsoft software we can provide if they don't have it by sending them a link with a password.

Increase value of practice to sell or merge

- **Any owner wants exit strategy**
- Don't believe my children want to take over practice & one day I don't just want to turn out the lights and lock the door
- To sell or merge practice need to show the following:
 - Verifiable financial statements to show cash flow
 - Key business relations and how to communicate with them
 - How new firm can easily work with existing clients
- Cloud computing is key to effectively showing the last two
 - Business relations located and useable in Outlook
 - All client documents stored in standard file formats on cloud

Downside of the Cloud

- **The Cloud is not perfect and we have had some difficulties involving the following:**
 - Users must have good computers.
 - Need Vista Business or XP Professional. These are usually not pre-installed on computers bought commercially.
 - These advance operating systems need more RAM memory than most people normally have. I have found 4 GB's of RAM is essential.
 - Outside workers can't upgrade their computers to meet these requirements and have to buy new ones to work with us.

Downside of the Cloud

- Saving large files on the cloud is slower than on the server. We have a T-1 line for Internet access and files over 5 MB are slower than we prefer.
- Some critical software can't be accessed from Microsoft's computer.
 - Quickbooks, our accounting and billing software, can't be run if the file is stored on Microsoft's computer.
 - We store it on a shared drive on one of the computer's in our office, but outside workers can't access it.
 - Since our practice is fixed fee this isn't critical.
 - Quickbook has its own "cloud", but lacks functionality.

Recommended software

- **“Cloud” like software which has help us:**
 - Jott – Call a number and dictate message. Will receive an e-mail with a transcription of your message and a link to your voice. Very helpful and reasonable price. <http://Jott.com>
 - Call Butler – A VOIP-based PBX system. Is now in public domain at <http://www.codeplex.com/callbutler>

Recommended software

- WorldMate – For people who travel this helps pull together your itineraries and allows you to get updates on flight delays and get information on alternative flight. Very helpful and reasonable price. <http://www.worldmate.com/>
- TimeBridge– Helps schedule meetings involving multiple parties. You send everyone up to 5 times you are available and they can pick what times are best for them and TimeBridge will pick the best time and notify everyone. The basic version is free at <http://www.timebridge.com>

Recommended software

- Meeting Sense – Useful in preparing a report of a meeting and assign tasks which will integrate with Outlook. Very helpful tool to remember tasks, assign them to the appropriate person, and follow-up to make sure they get done.
<http://www.meetingsense.com>
- MindManager – Extremely powerful tool to help graphically organize, collaborate on, and manage complex tasks involving many parties.
<http://www.mindjet.com>