

The Four Options for Practice Management on the Go

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Working on vacation may sound like a terrible idea, but like anything it's all relative. It beats canceling a vacation. Here's the problem. You can't manage your practice by calendar and email alone. You need access to your entire practice management system. In this issue of TechnoFeature, lawyer and practice management expert Seth Rowland runs through the four current options for accessing your practice management system on the go. For each option, he discusses several products, including their pros and cons.

INTRODUCTION

Practice management extends beyond just billing and calendaring. Its true value lies in the word "management" — management of information, documents, and activities. And in today's mobile office, much of that management has to occur 24x7 while you are "On the Go." With business occurring around the clock, you can no longer depend on the few hours at your desk to catch up on your work. You need, crave, and depend on constant connectivity. Okay, maybe not crave.

THE BEST PRACTICE MANAGEMENT SYSTEM IS THE ONE IN YOUR POCKET

They say the best camera is the one with you. The same goes for practice management systems.

Mobile phones have morphed into mobile computers. On February 4, 2001, at LegalTech New York in a presentation titled *The New New Thing*, Dan Coolidge and I predicted the emergence of "Super Cellphones" and "Webpads" as ubiquitous devices for all attorneys.

Fast forward to 2011. Everyone has an Android, BlackBerry, iPhone, etc. computer in their pocket. Some have slightly bigger pockets that hold a mini-tablet like the Galaxy Tab or Kindle Fire. Some have satchels that carry an iPad or one of its countless competitors. And some have wireless-enabled laptops, many of which are "ultra-portables" weighing in at under four pounds.

These devices pack a lot of power and connectivity. They can store gigabytes of information, access cloud-based services, and connect to your desktop. In short, there is a bridge between your life "On the Go" and your law practice management information. The information you seek is no longer restricted to "What's on my calendar?" but rather "Give me all you have on the Smith file since I'm meeting him in five minutes."

SYNCHRONIZATION: THE FIRST CIRCLE OF HELL

In Dante Alighieri's epic poem, *The Divine Comedy*, the author travels with Virgil into "Limbo," the First Circle of Hell. Practice management synchronization with mobile

devices, whether to smartphones, tablets, or ultra-portables, is like Limbo. The device is treated as a second-class citizen that can see "some of the data" and interact with "some of the data."

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The amount of information that you can view on the device is often limited. For example, the devices lack the ability to see "related information" on a person or file, or to navigate from an Event to the Contact to the Notes on that Contact. Contact information includes a limited number of fields. Events don't link to case files. Notes are isolated in a separate application.

If this weren't bad enough, you should review carefully the elaborate steps required to "configure" this synchronization. It starts with "mapping" of fields on the device to your practice management system. Then there is the decision as to whether to synchronize all or a subset of data to the device. Further choices exist whether to make the synchronization "bi-directional."

If you map fields incorrectly, and then enable bi-directional sync, you could corrupt your entire

database. If multiple users sync to the same database, conflicts will arise. Initializing the sync to an already populated contact list can cause multiple issues. If you err, you risk the addition of thousands of duplicate (and inadequate) contacts in your practice management system. And then there are issues of public and private contacts, public and private events, and tasks.

Luckily, four alternatives to synchronization exist that enable you to take full advantage of the computer in your pocket or in your satchel. But first a word of caution about security. An unsavory opposing counsel could take a peek at your smartphone if you leave it behind after a deposition. In cases of theft, savvy criminals immediately power down your device until they're in a location beyond the reach of a cell tower, rendering features such as remote wipe useless. Security lies beyond the scope of this article, but secure your mobile devices as best you can to prevent access to your client data.

Some practice management services are completely cloud based, enabling you to access them from any web browser, including those on smartphones.

OPTION 1: MOBILE PRACTICE MANAGEMENT APPS

In the past few years, practice management vendors and third party developers have released mobile apps that interact directly with your practice management

database. These apps connect through "web portals."

[Amicus Mobile 2011](#) is available as an add-on for users of Amicus Attorney Enterprise Edition. Amicus Mobile enables you to access your case files, enter notes, record phone calls, and bill for your time. It's for BlackBerrys only at this point in time. Read *TL NewsWire's* report, [Your Practice in Your Pocket](#).

[Time Matters Mobility](#) gives you access to contacts, files, events, and billings in Time Matters via your smartphone's web browser. It's available free for users current on their Annual Maintenance Plan. Read *TL NewsWire's* report, [Your Practice Management System in Your Pocket](#).

[MobileTM for Time Matters](#) is an application built by DataEquity that provides access to all record types in your Time Matters database via a read-only portal accessible through your smartphone's web browser. You can choose which fields to display, and the order in which they appear. From any record you can directly link to any related records, including notes, calls, events, contacts. Read *TL NewsWire's* report, [Take Time Matters Everywhere You Go](#).

AdvologixPM works with the Salesforce.com mobile app. You gain access to all record types and can configure which fields you see on the app, including the ability to add new records that instantly appear in your system. [TechnoLawyer](#) recently reviewed [AdvologixPM](#) in its *TechnoFeature* newsletter.

[HoudiniESQ Mobile](#) offers a stripped down version of its hybrid cloud/

desktop practice management system. [TechnoLawyer](#) also reviewed [HoudiniESQ](#) in *TechnoFeature*.

What if you like desktop software but also like the idea of the cloud? For a monthly fee, you can access desktop-class software hosted online.

OPTION 2: CLOUD PRACTICE MANAGEMENT SYSTEMS

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Look for a service capable of adjusting to your device. AdvologixPM, [Clio](#), and [Rocket Matter](#) have smartphone-savvy web sites.

[Credenza](#) offers a hybrid cloud/desktop solution though different from HoudiniESQ. It works inside Outlook — any copy of Outlook once you login as your data is stored in the cloud (Credenza also runs offline using a local data store). For now, Credenza is PC-bound since Outlook is PC-bound.

OPTION 3: VIRTUAL DESKTOPS

What if you like desktop software but also like the idea of the cloud? For a monthly fee, you can access desktop-class software hosted online. There are currently two vendors servicing the legal space directly — [KubeLegal](#) and [Precedent Solutions](#).

They create a virtualized server, a virtualized network, and several

virtual PCs. They also keep your software up-to-date and your data backed up. The typical all-inclusive fee ranges from \$300 per month for the Server and \$100 per month for each PC. In this environment, you can run your full system, including Microsoft Office and Outlook, securely, remotely, from anywhere, on any device — mini-tablet, iPad, Mac or PC.

OPTION 4: REMOTE CONTROL

As you likely know, more and more Tablets like the iPad and ultra-portables have a large enough screen to make remote control

a viable option. With a remote control application, you access your practice management system on your office computer. Remote control products include [GoToMyPC](#), [LogMeIn](#), and [TeamViewer](#) among many others, including some that are free. For all these services, you must keep your office computer running and connected to the Internet.

CONCLUSION

The pressures on law firms are immense. In the old days, you were confined to long hours working in the office. When out of

the office, you had access to your calendar and email, but that was about all. With portable computers in your pocket, you can now have secure and continuous access to practically everything in your office. You have the “freedom” to work from home, the local coffee shop, and on vacation. You also can travel much lighter to court and elsewhere since you can access the same digital files there as in your office. Whether you embrace this brave new world with both arms, or run screaming for a quiet cabin on Walden Pond is up to you.

Seth Rowland was named TechnoLawyer Consultant of the Year in 2002 for his contributions in legal technology in the areas of document assembly and law practice automation. He is a nationally known technologist whose company, [Basha Systems LLC](#), has helped many law firms manage implement, and configure practice management solutions, including AdvologixPM, Amicus Attorney, Credenza, and Time Matters. Please [visit his blog](#) for the latest on document assembly and practice management.

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