

# Vetting Tech for Your Law Firm: Practical Tips



D.C. Bar

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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, ILTA



# 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

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- **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!)**



# Which do you need?

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# 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**



2022 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

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**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:

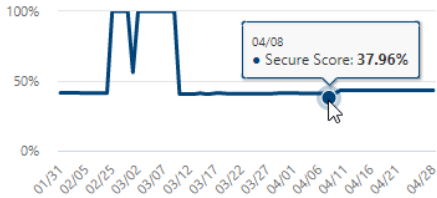
[Filter](#)

Your secure score

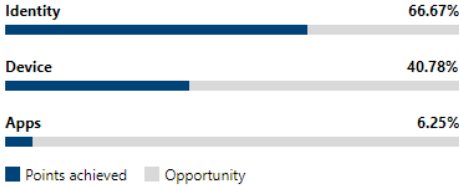
Include ▼

### Secure Score: 43.3%

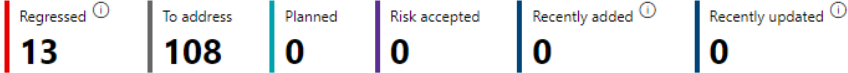
411.83/951 points achieved



Breakdown points by: Category ▼



Actions to review

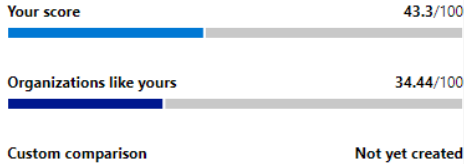


Top improvement actions

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

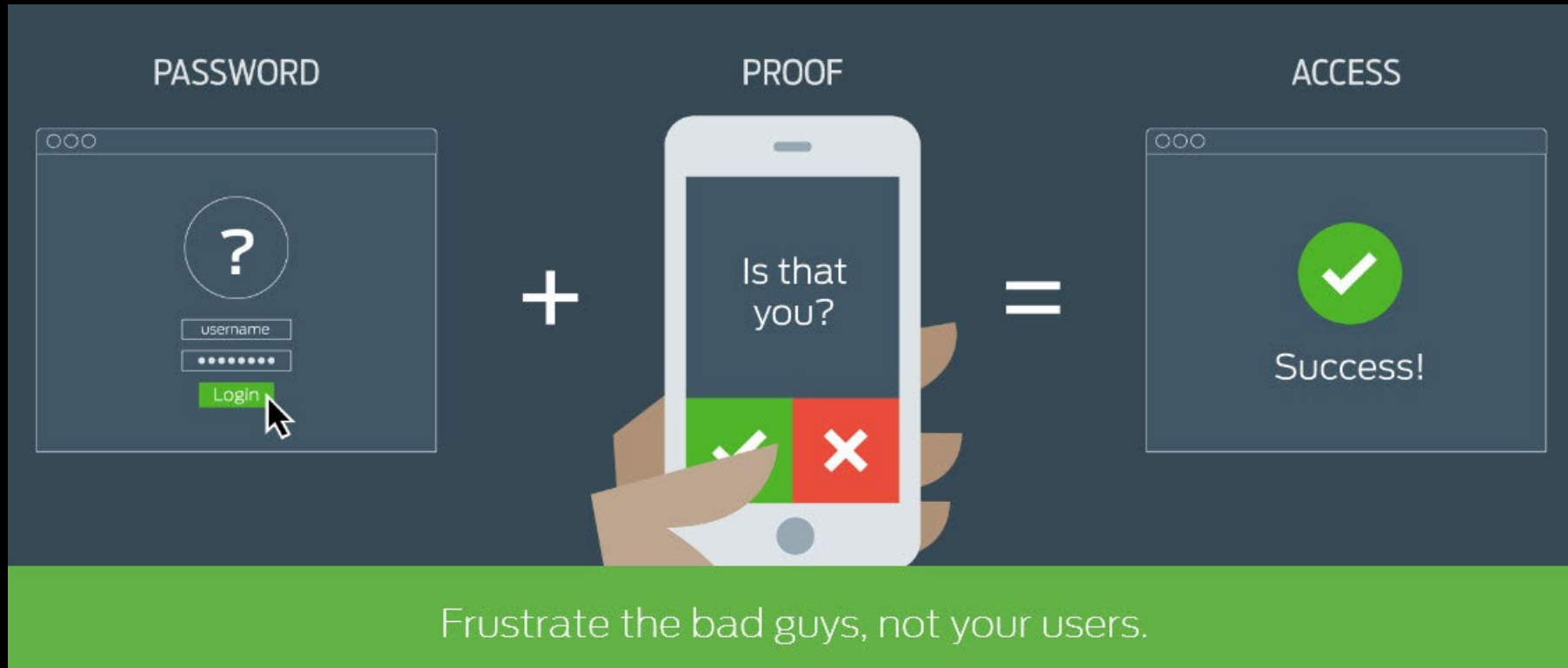
Resources

[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?

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- #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**<sup>®</sup>  
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®



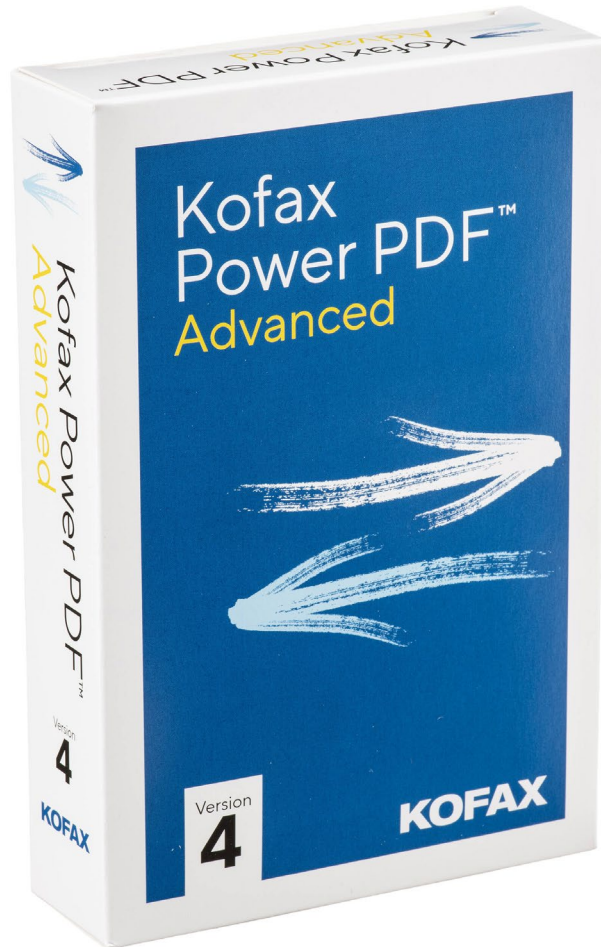
# Adobe Acrobat DC



Acrobat DC Pro



# Power PDF – Acrobat Alternative



- Power PDF Advanced alternative to Acrobat Pro
- Bates stamping
- Redaction
- Encryption
- Cloud-integration
- 15 day trial
- \$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 one-time
- \$99/year subscription
- \$16.99/month subscription

# 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

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**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.

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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*



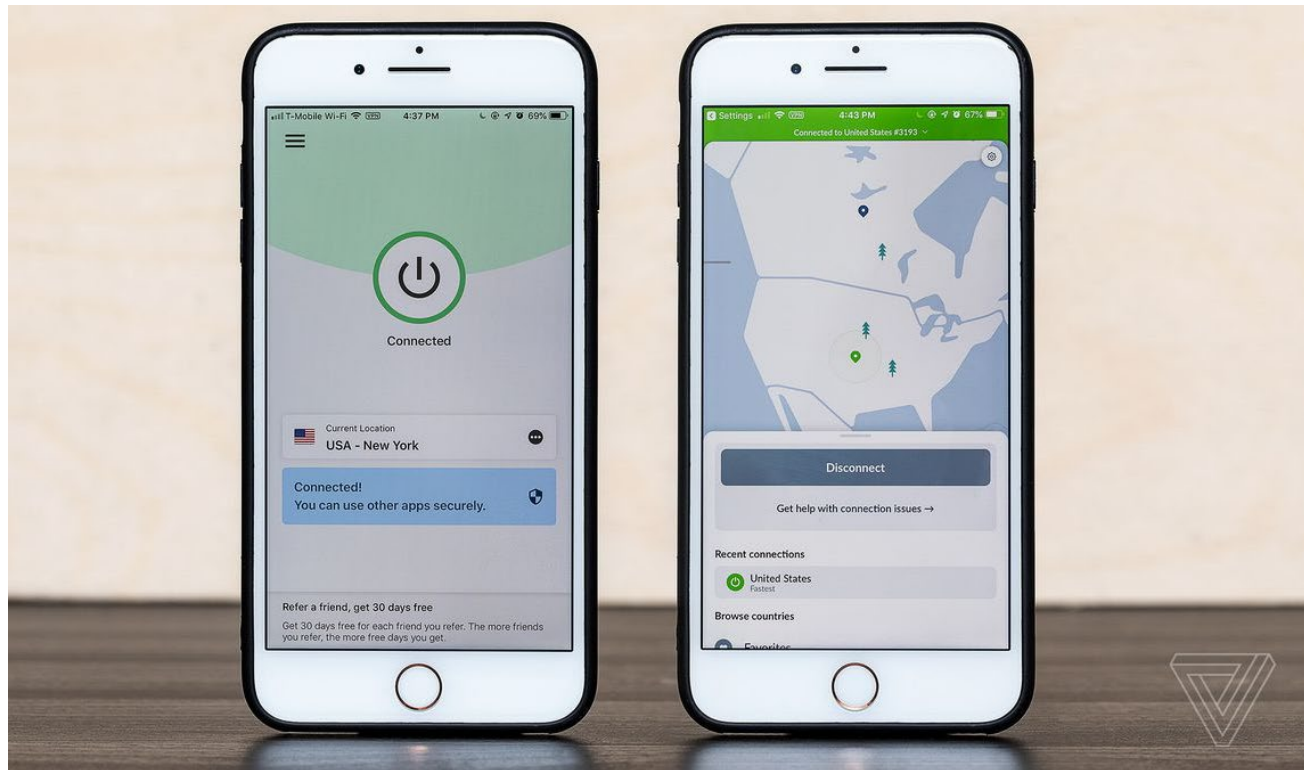
Electronic signatures/electronic contracts

DocuSign, Adobe Sign



**Videoconferencing is here to stay!**

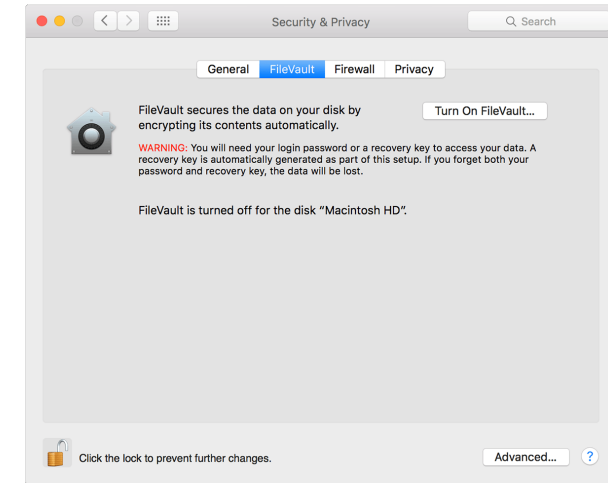
# Secure remote access – Encrypted transmission



- ExpressVPN (\$12.95/month)
- NordVPN (\$11.99/month)
- Terminal Server
- Citrix
- LogMeIn
- GoToMyPC
- ConnectWise Control

# Encryption Software

SafeGuard  
Device Encryption



# Password Managers

LastPass \*\*\*\*

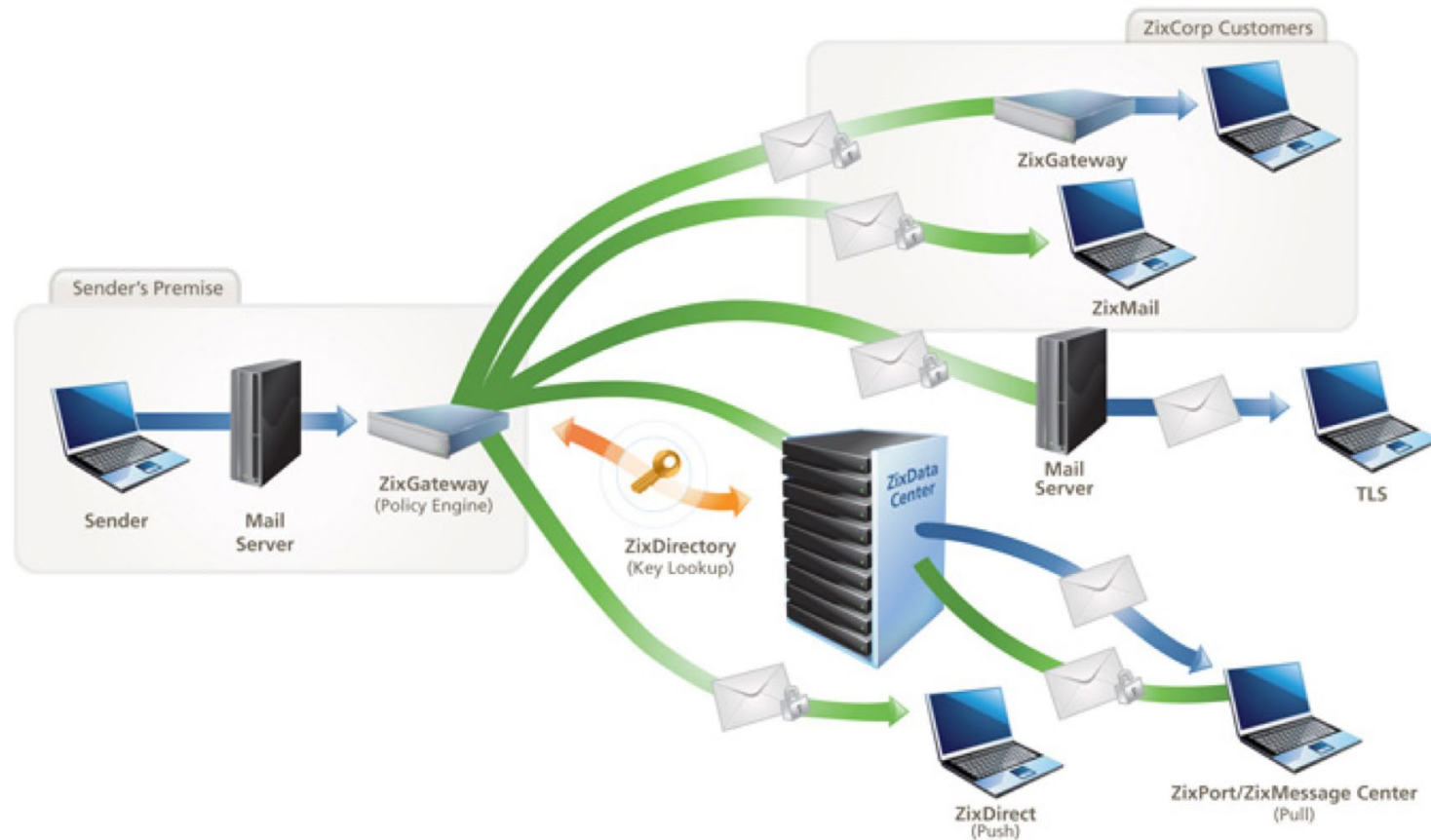
- LastPass – free/premium version \$36 a year, multi-platform
- eWallet - \$19.99, \$9.99 for mobile platforms
- Keeper – \$34.99 per year (sync multiple devices)
- 1Password - \$2.99/month, family plan \$4.99/month
- Dashlane – Free, \$59.88 per year (sync multiple devices)
- PC Magazine – best password managers - 2022:  
<https://www.pcmag.com/picks/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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