



Making technology work for you

and not the other
way around

Our watch can track our heartbeat when we exercise; our fridge can order a dozen eggs when we're running low; our cars can drive for us (or at least tell us when we drift out of our lanes); and our phone can recognize our face when we look at it. Every facet of our lives is affected by rapidly evolving technology. The legal profession is no exception.

For new lawyers, and even seasoned associates, the sheer volume of software solutions, subscription services, or server security systems that a sole practitioner or law firm must familiarize themselves with can be daunting. While LAWPRO doesn't endorse or recommend any particular software products, we've provided some examples below to help get you started on determining just what you may need to build your practice.

For more examples and tutorials on the various programs described below, see our table of *Technology Products for Lawyers and Law Firms*, available on practicepro.ca.

Practice management software and "all-in-one" solutions

The easiest way to cut through the volume of software and tech solutions available to lawyers is to consider investing in an "all-in-one" solution. While no program will cover everything a lawyer does in a day, many subscription services provide user-friendly software packages designed specifically for lawyers to manage the bulk of the firm's administration needs. These platforms will organize your digital files by matter and client, track deadlines and provide reminders, bill clients, accept

payments, coordinate trust accounting needs, and perform various other functions. Examples include *Clio's Practice Management Platform*, *Cosmolex*, *PC Law* and *Time Matters*, *Matter365*, or *Filevine*.

Billing and payment products

While the tools for billing clients and collecting payments are often built into the all-in-one packages discussed above, some lawyers may opt for a more bespoke approach. Services like *Stripe Payments* allow lawyers to accept funds by credit card, debit card, and other means. Keep in mind that some billing software not designed for lawyers specifically may not allow users to intuitively distinguish between trust and administrative accounts, or properly abide by Law Society rules when it comes to unearned retainer funds. Services such as *LawPay*, which not only organizes payments but also facilitates the receipt of funds by credit card and other means, may be necessary to provide simple billing and payment options to your client while maintaining compliance with trust accounting rules.

For lawyers operating a brick-and-mortar office or meeting with clients in person, consider investing in POS (Point-of-Sale) equipment such as a *Square Terminal* or *Square Reader*, which can connect to a smartphone to accept credit card payments by chip or tap.

Client ID and verification

Verifying that the client is who they claim to be is a key part of opening any file. Law Society rules generally require such verification for anti-money laundering purposes (with some exceptions). Equally important, however, is how proper verification can prevent the lawyer themselves from being targeted for fraud. Various tools are now available to assist with confirming the authenticity of a client's government-issued ID for verification

purposes. Applications such as *Treefort*, *LexisNexis TrueID*, and other similar programs use the client's smartphone camera to scan identification documents, authenticate the document, and compare any photo-ID with a selfie contemporaneously taken by the client.

Time tracking tools

Lawyers billing by the hour need a simple way of tracking those hours. While many lawyers still track their time manually, timekeeping software can be integrated into a lawyer's computer and virtual telephone system to automatically keep track of every second spent on a file.

Like billing and payment tools, time-tracking is often built into the practice management packages discussed above, but à la carte options like *Wise-Time* are also available.

Team management and collaboration tools

Working with colleagues, whether it's a fellow lawyer, a paralegal, or a legal assistant, can be much more complicated in a virtual environment. With more lawyers working primarily from home, online collaboration tools may be a necessary addition to any law firm's workflow.

Communication hubs such as *Microsoft Teams* and *Slack* allow colleagues to instantly communicate, coordinate, and share documents remotely. Project management software such as *Trello*, *Confluence*, and *Monday.com* are designed to help managers assign work to team members and monitor the progress of various projects. Other examples, such as *Legalboards*, are designed with the specific needs of law firms in mind.

Cybersecurity

All lawyers should be careful to maintain proper cybersecurity in their practice. While it's, quite frankly, impossible to remember multiple complex alphanumeric passwords (and then annually update them), proper password hygiene can be maintained by utilizing tools such as *1Password* or *Lastpass*, which store passwords and other sensitive information in a "virtual vault" (with data maintained on Canadian servers), usually protected by a Two-Factor Authorization (2FA) system.

Speaking of 2FA, applications such as *Authy* and *Microsoft Authenticator* can be easily downloaded onto a smartphone and connected to the lawyer's computer or database, requiring all users to have both a valid password as well as a validated smartphone in order to access confidential information.

Social media and marketing

Alas, like any business, law firms need to spend time thinking about their marketing needs. Programs such as *Canva* provide simple tools for creating graphics and advertisements that can be used to promote a law firm on social media or elsewhere. *Loomly*, *Hootsuite*, and other similar software can help collate and organize your social media posts and marketing strategy into a single, easily digestible format.

For online marketing and ad spends, tools such as *Google Search Console* and *Google Analytics* can help a law firm optimize their website so it is more likely to appear in web searches and track the efficacy of online advertising. Third party alternatives to these Google tools are also available.

Transcription software

Virtual dictation assistants have become extremely effective and accurate in transforming recorded audio into text. Programs such as *Dragon Speech*

Recognition or *SpeechExec* can be used to draft memos or notes to file by way of dictating directly to the software, while even the ubiquitous Microsoft Word allows for speech-to-text dictation options.

Additionally, certain programs like *Otter.ai* facilitate the transcription of recorded meetings or interviews, usually with the convenience of automatically distinguishing between different speakers. Keep in mind that using cloud-based services means that the content of the conversation will be shared and possibly stored with a third party (perhaps outside of Canada). Be careful to ensure that the encryption and confidentiality policies of any cloud-based service you use satisfies your ethical obligations to protect potentially privileged information.

AI: Machine learning and large language models

Artificial Intelligence (AI) is a computer-based technology that can perform tasks that typically require human intelligence, such as solving problems, analyzing documents, and producing written responses. AI learns from large amounts of information to understand how words, phrases, sentences, and even paragraphs are used together. In the legal world, AI can be helpful for tasks such as document review, research, and drafting, but be careful when using it because sometimes it may produce inaccurate information. If you use AI in your legal practice, you should review its output carefully by cross-referencing information against reliable resources, checking the credibility of sources, and applying your own professional judgement before relying on it or sharing with clients, opposing counsel, or the courts. ■