

Book Review

By Peter Roberts

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Title: The 2019 Solo and Small Firm Legal Technology Guide

I am not a computer geek, but I am an avid observer of the law office tech scene much like you may be. I have also had experience helping attorneys choose software.

I believe the changing nature of law office technology demands someone to stand at the gates and determine what technology is worth knowing about and why. That “someone” are the authors of this valuable annual guide. Call the book a buffet or call it a textbook or call it a reference work, but don’t call it a disappointment. Besides reciting specifications, statistics and acronyms, the authors also often refer to their experiences actually assisting solo and small firms with their technology challenges and they share their observations and opinions about what they see out there. In some ways, I felt like I was sitting in a room with the authors simply chatting about law office technology. When they described a certain technology was “more expensive than blood” they kept my attention. And I agree with their recommendation to early on query your lawyer colleagues about their own choices of technologies and subsequent experiences.

Where is the glossary of tech terms? Such a list is missing, but the terms are defined within their contexts where used. I note “evergreen retainer” is not defined. Appendices? No. The lists of discrete issues or questions that might comprise one or more appendices are embedded with the text. Must reading is the description of Microsoft Office with its several current iterations. The Corel Suite is also described for the lovers of Reveal Codes. As for the accuracy of Dragon Naturally Speaking, it is described as “astonishing.”

The book scripts you for what to ask the tech vendors as you consider practice management software. My recommendation has always been to lean on your office tech go-to person for these conversations with the vendors. Clio, the cloud-based offering based in Canada is included yet heed the authors’ counsel to read the terms of service of any vendor. In Clio’s case, the terms of service near the end describe that you will deal with the laws of Ireland in the event of any dispute. The discussion of Quickbooks is helpful especially noting the training help available from night courses at community colleges. A major quality of the book is its self-imposed limits on the scope of the content to only known and reliable resources. Yet included is Kurent, “new to the scene in 2017.” While that phrase rhymes, I am not sure I would burden the reader with software with such a short track record.

Finally, when you spot the book and/or purchase it, turn immediately to page 180 and absorb the good counsel under the heading, “Many Lawyers Need a Digital Detox.” Truly, this is food for thought.