

**RESPONDING TO THE CORONAVIRUS PANDEMIC
LEVERAGING TECHNOLOGY
TO IMPROVE YOUR FIRM'S
PERFORMANCE AND PROFITABILITY**
An MPF Webinar – July 8, 2020

by

Uri Gutfreund

Law Firm Group Leader, Risk Strategies Company

Lee Hovermale

CEO, FlexManage

John Remsen, Jr.

President, TheRemsenGroup

Morris Tabush

Founder and President, Tabush Group

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Smart Strategies for the Forward Thinking Law Firm

TheRemsenGroup.com

BIOGRAPHICAL PROFILE

Uri Gutfreund

National Law Firm Practice Leader
Risk Strategies Company
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Uri Gutfreund is The National Law Firm Practice Leader at Risk Strategies Company, a top 25 national insurance brokerage and The Founder and Moderator of The Managing Partner Round Table™, a regional peer-to-peer professional development group. This unique program has quickly become a leading venue for thought leaders in the legal industry.

At Risk Strategies, Uri is responsible for the development and execution of all insurance and risk management services to the company's law firm clients. He oversees all of law firm specialty areas including: Health, Professional Liability, Property and Casualty, Cyber and EPLI. His practice leadership combines 20 years personal experience with cutting edge innovation remaking law firm insurance programs using the latest technology, peer benchmarking, and real time best practices to serve the company's law firm clients.

He is a Registered Professional Liability Underwriter since 2001 and a frequent speaker and writer on law firm leadership, law firm business practices and insurance and risk management at national and regional conferences.

Selected Publications and Presentations:

- "Everything You Need to Know about Insurance For Your Firm in 60 Minutes," Speaker of the Month, St. Louis, Atlanta, 2016.
- "2015 Tax Deduction Opportunity: 5 Steps to Overpay For Your Professional Liability Insurance," 2015.
- "Is Your Firm the Next Target for Hackers?" Business of Law Conference, 2015.
- "Change or Be Eliminated: Why Every Administrator Should Become a CFO," Business of Law Conference, 2015.
- "Disability Insurance for Law Firms – It's All in the Details," Association of Legal Administrators - Annual Conference Speaker, 2015.
- "Errors, Omissions & Scares-PLI! Professional Liability Insurance Unmasked," Association of Legal Administrators - Annual Conference Speaker, 2014.

- “Buying and Selling a Law Practice,” Westchester Bar Association Speaker, 2014.
- “Suing for your fees: Three insurance considerations to safely collect what’s rightfully yours,” 2013.

April 2019

BIOGRAPHICAL PROFILE

Lee Hovermale

Chief Executive Officer

FlexManage

Houston, Texas

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Lee currently serves as Chief Executive Officer of FlexManage. Prior to his role as CEO, Lee spent 11 years as Executive Vice President for the company's South Central region.

Prior to joining FlexManage, Lee served as Principal/Chief Information Officer at Client Profiles Corporation based in Atlanta, GA. Before working at Client Profiles he was the Principal/Chief Information Officer at FirmLogic, L.P. In 1995, Lee was the co-founder of Enhanced Systems and Solutions (ESS), a leading integration firm serving the legal industry. He was a member of the ESS Board of Directors and the company's Strategic Planning Committee responsible for researching vendors and products to bring value to ESS E-Support and Web-based System Management Offerings. In 1999, ESS was recognized by the Houston Business Journal as the 2nd fastest growing private company in Houston. Prior to co-founding ESS, Lee specialized in law firm integration while employed with LAN Systems in Washington, D.C.

Lee's expertise in the areas of security, professional project management, computer technology, product knowledge and Disaster Recovery/Business Continuity consulting has earned him the reputation as a leader in the Information Technology industry.

April 2019

BIOGRAPHICAL PROFILE

John Remsen, Jr.

President

TheRemsenGroup

Atlanta, Georgia

404.885.9100 – jremsen@theremsengroup.com

John Remsen, Jr., is widely recognized as one of the country's leading authorities on law firm leadership, management, marketing and business development. Since 1997 TheRemsenGroup has consulted with more than 400 law firms and thousands of law firm leaders to help them develop and implement long-term strategic objectives to improve cohesiveness, profitability and sustainability.

John is a frequent speaker and author on law-firm leadership and marketing topics. He has spoken at national and regional conferences of the Legal Marketing Association, Association of Legal Administrators, American Bar Association, and numerous state and local bar associations. His articles have appeared in dozens of highly respected legal publications, including the ABA Journal, Law Practice Management, Law Practice Today, Law360, Legal Management, Marketing for Lawyers, Marketing the Law Firm, Managing Partner, National Law Review and New York Law Journal.

Since 1988, John has been an active member of the Legal Marketing Association, and he has served as President of LMA's Southeastern Chapter, Executive Editor of Strategies (LMA's newsletter) and a member of LMA's national Board of Directors. He is also an active member of the Association of Legal Administrators and a popular speaker at ALA meetings and conferences.

In 2002, John created The Managing Partner Forum, a highly acclaimed conference series and community for managing partners and law firm leaders. More than 1,200 firm leaders from 900 law firms from 43 states have participated in 26 conferences. In addition, John distributes The MPF Weekly, an electronic newsletter to more than 10,500 firm leaders throughout the U.S., Canada and 28 other countries.

John's influence was underscored when he was inducted as a Fellow of the College of Law Practice Management in 2013, in recognition of his 25 years of demonstrated expertise in law firm leadership and management. Founded in 1994, the College honors those who "inspire excellence and innovation in law practice management." Membership is by invitation only and includes just 200 individuals.

And the College was not alone: in 2016, John was recognized by LawDragon as one of the "Top 100 Consultants and Strategists" to the legal profession; and in 2017, John was recognized as one of the world's top "leaders and influencers" in the business of law by the Association of International Law Firm Networks.

A native of West Palm Beach, Florida, John holds an MBA from The University of Virginia (1985) and a bachelor's degree in Business Administration from the University of Florida (1980). Prior to enrolling in graduate school, John was Executive Director of The Florida Council of 100, an organization comprised of Florida's top CEOs and other business leaders.

April 2019

BIOGRAPHICAL PROFILE

Morris Tabush

Founder & President

Tabush Group

New York, New York

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Morris is a community activist, tech hobbyist, and serial entrepreneur who can never leave well-enough alone.

Morris grew up passionate about technology and helping others. His parents bought him his first computer when he was 7 years old. At twenty years old, the constant requests from friends and family to help with their IT needs led Morris to turn his passion into a business, founding Tabush Group from his college dorm room in 2000.

Morris oversees all aspects of the firm's business and clients. He ensures the Tabush Group team focuses on delivering outstanding service to clients.

Morris led the growth of the business into one of New York's leading managed services providers with a focus on the needs of professional firms. He has been involved in ground-up network design and implementations, ERP migrations, cloud, telecommunications, data center, security, and other areas of business IT for clients ranging from startups to multi-generational businesses, not-for-profits to publicly traded firms, and organizations across the United States, Mexico, and Europe. Most recently, Morris led the initial development of Boxtop™, Tabush Group's cloud desktop platform.

In addition to his efforts at Tabush Group, Morris co-founded Bill4Time in 2007, one of the first cloud-based time and billing systems for law firms.

Morris regularly presents to groups nationwide on topics including entrepreneurship, IT management, security, and cloud, and he has been quoted in the media on both IT and business topics. He has a Bachelor of Science degree in Information Systems from Yeshiva University.

Morris enjoys staying fit through running and cycling, and has been a community activist for more than twenty years, working in youth outreach, emergency medical services, and school advocacy organizations. He grew up in New Jersey, and currently lives in Brooklyn with his wife and children.

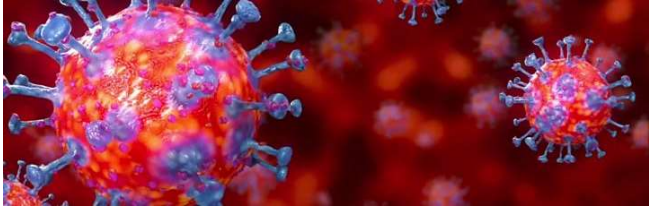
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Responding to the Coronavirus Pandemic

**Managing Partner Forum®**
ADVANCING THE BUSINESS OF LAW

Responding to the Coronavirus Pandemic
Leveraging Technology to Improve
Your Firm's Performance and Profitability
An MPF Webinar with Lee Hovermale and Morris Tabush
July 8, 2020 – 2:00pm ET



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John Remsen, Jr.

- President, TheRemsenGroup
- President & CEO, Managing Partner Forum
- Strategic Planning, Marketing/Business Development, Firm Retreats, COO/CMO Search
- Fellow, College of Law Practice Management
- Speaker:
 - American Bar Association
 - Association of Legal Administrators
 - Legal Marketing Association
 - MPF Annual Conference
 - Law Firm Networks
- Education:
 - MBA – University of Virginia
 - BSBA – University of Florida

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Responding to the Coronavirus Pandemic



Uri Gutfreund

- National Law Firm Practice Leader, Risk Strategies Company
- Founder, The Managing Partner Roundtable
- Speaker:
 - American Bar Association
 - Association of Legal Administrators
 - Managing Partner Summit
 - MPF Annual Conference
 - Law Firm Networks
- Education:
 - BA – Yeshiva University



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Lee Hovermale

- CEO, FlexManage
- IT solutions for law firms
- Houston, TX
- Principal/CIO, Client Profiles
- Principal/CIO, FirmLogic
- Co-founder, Enhanced Systems and Solutions (ESS)
- Author of numerous articles
- Speaker:
 - Association of Legal Administrators
 - MPF Leadership Conference
- Education:
 - University of Maryland



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Morris Tabush

- Founder and President, Tabush Group
- IT for law and professional services firms
- New York, New York
- Co-founder, Bill4Time – cloud-based e-billing
- Author and Speaker:
 - ABA Tech Show
 - Association of Legal Administrators
 - Managing Partner Forum
 - Managing Partner Summit
- Education:
 - BS – Yeshiva University



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TODAY'S SESSION

- Opening Remarks
- Survey Results
- Comments from Lee and Morris
- Group Discussion
- Audience Polling and Questions
- Recording and Handout Materials



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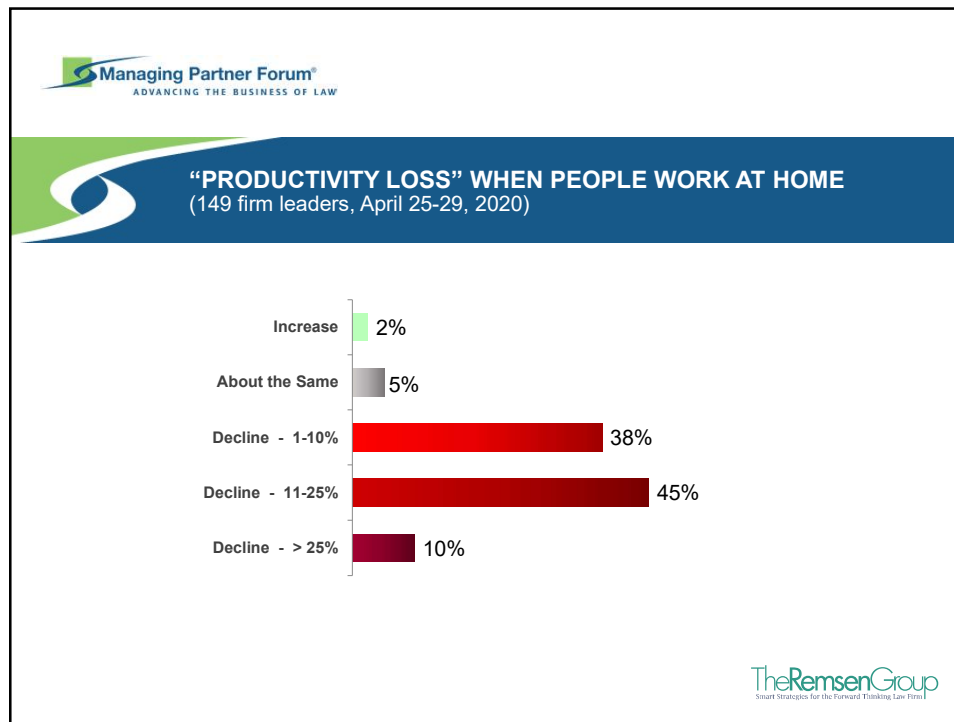


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Culture in the Changing Environment

- **62%** of workers are working remotely during pandemic
- **59%** of workers prefer to stay working remotely even after restrictions lifted
- **38%** workers actively engaged, while 13% are actively disengaged
- Well-being has hit a record low of **46%** with WORRY & STRESS leading causes

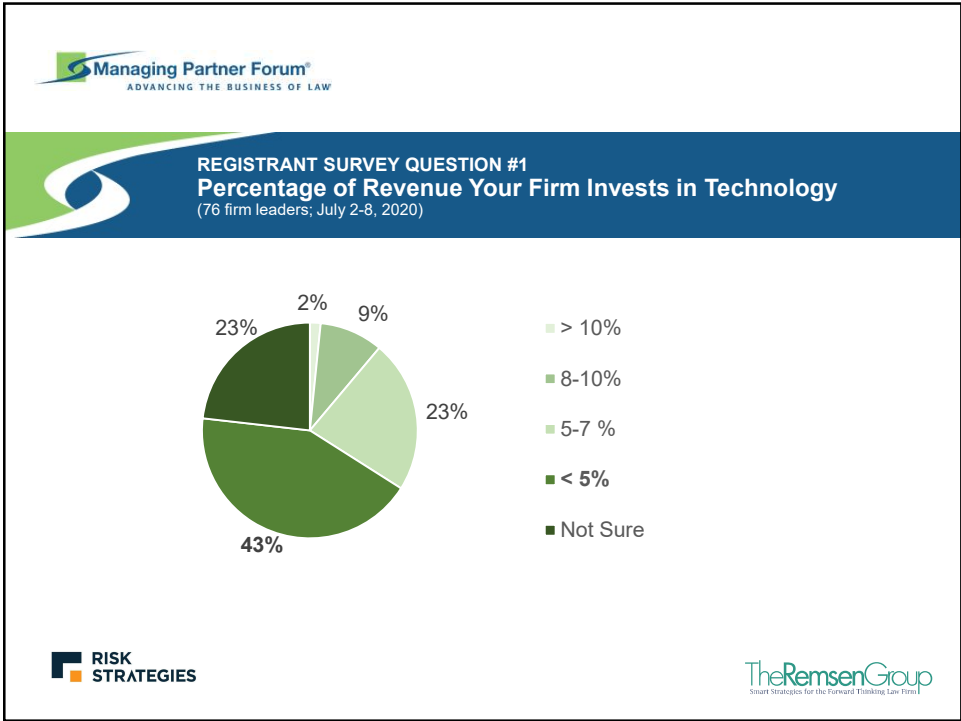
Gallup



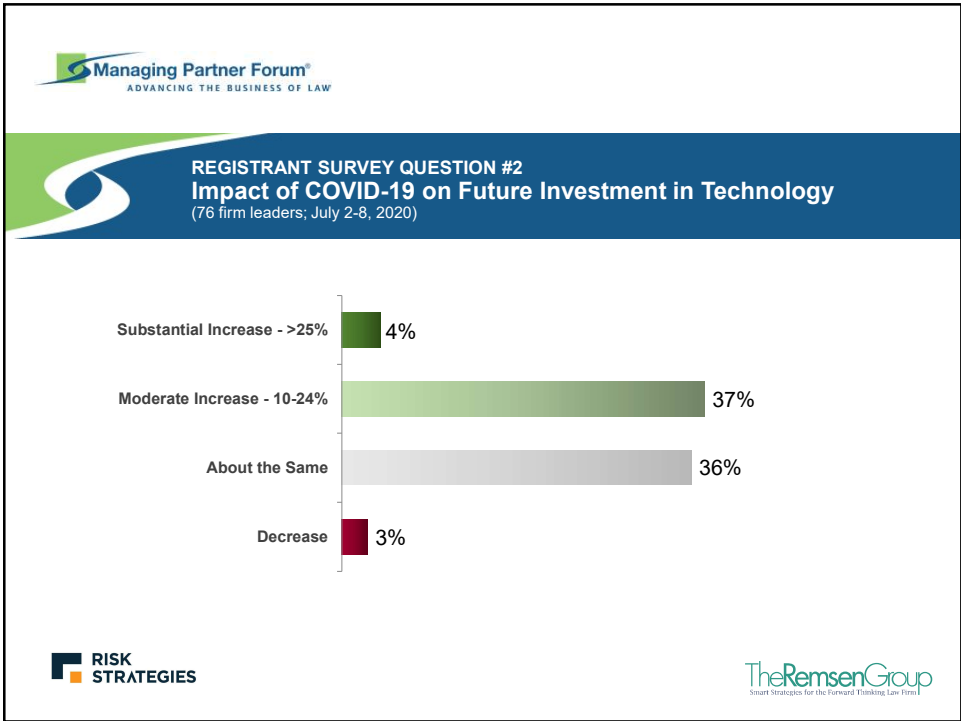
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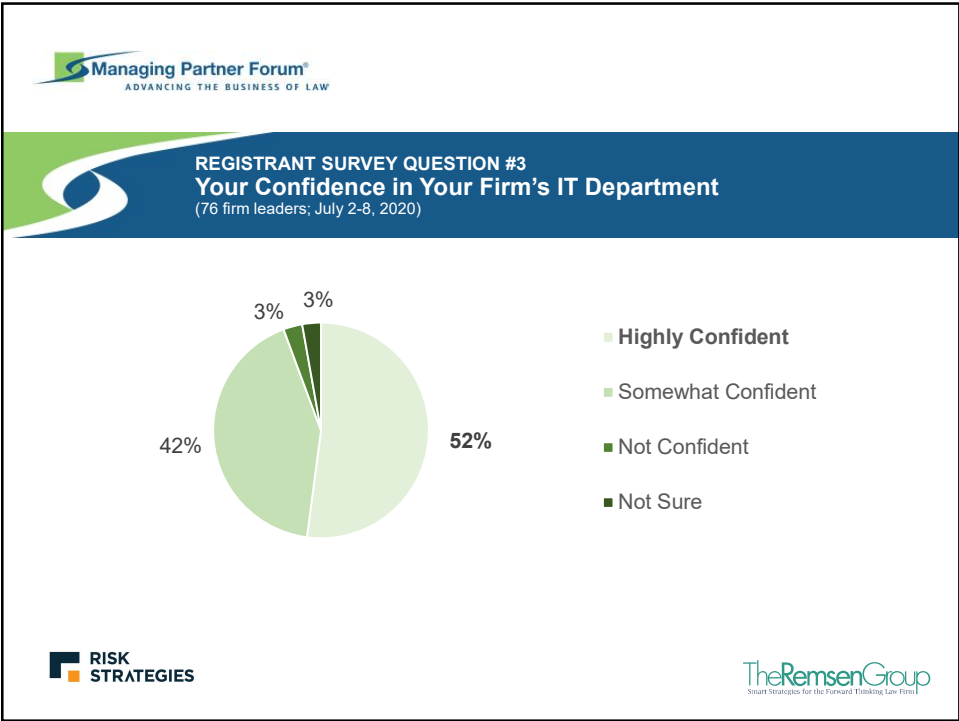


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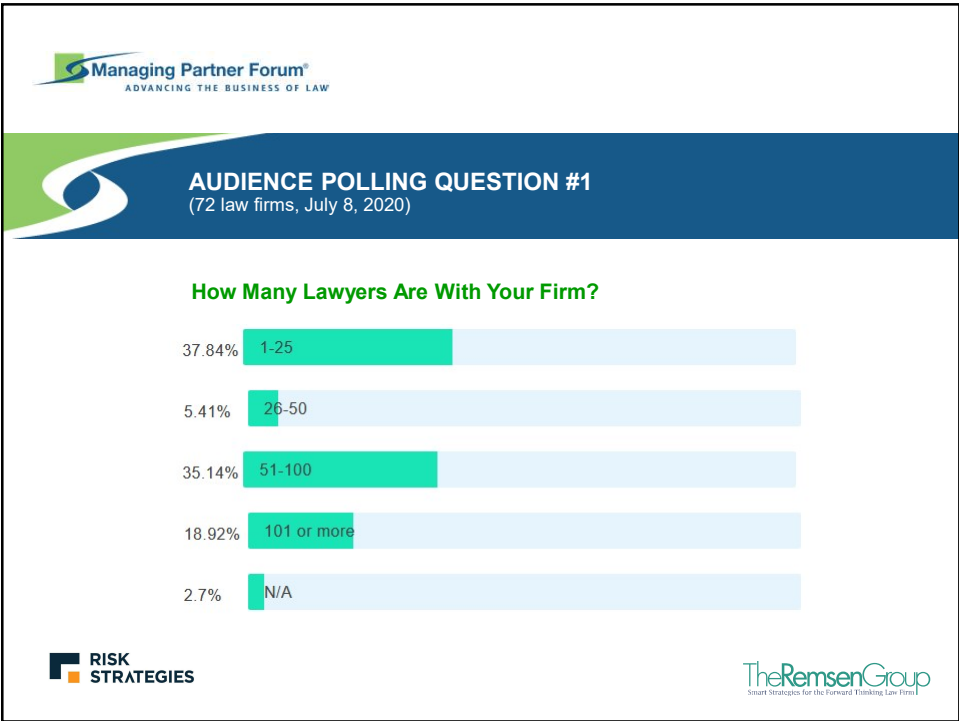


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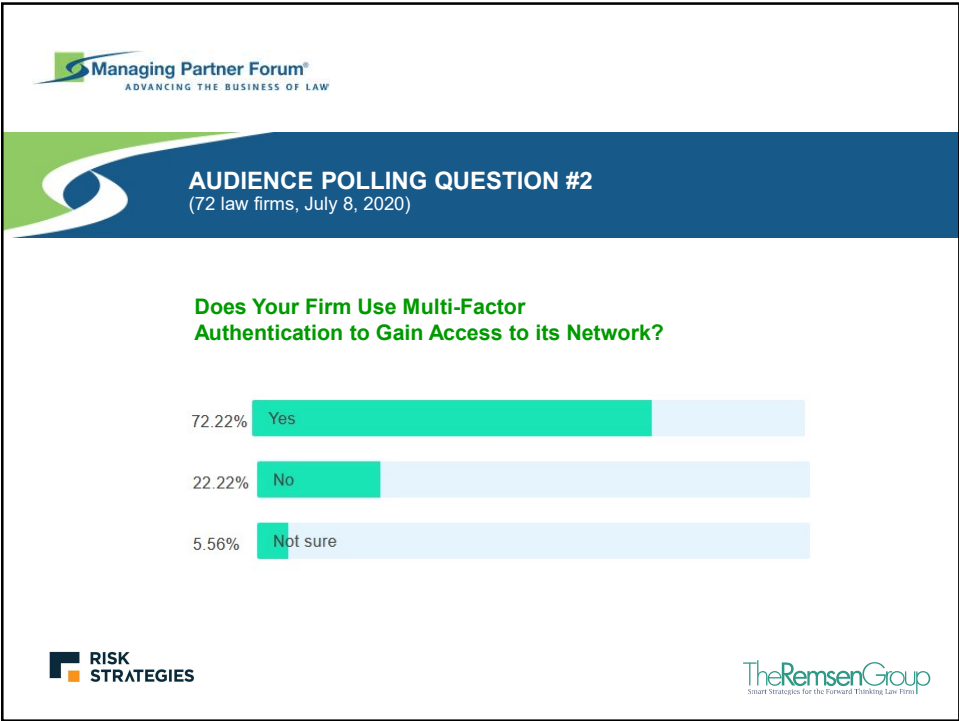


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a new era technology company

**Leveraging Technology to Improve
Your Firm's Performance and Profitability**

Lee Hovermale

7/8/2020

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FlexManage/New Era Technology

Our Company



Locations

New Era Technology has **30+** offices around the globe in the United States (**CT, IL, IN, MA, NH, NJ, NY, OH, PA, TX, & WV**), the United Kingdom, Australia, and New Zealand.



Our People

With **1,200+ employees**, New Era is comprised of the finest team of Engineers, Designers, Installers, Technicians and Sales Professionals, who provide hands on collaborative consultation backed by industry training and certification.



Solutions + Services

- Collaboration & Unified Communications
- Data Networking
- Security & Life Safety
- Cloud Services
- Managed Services
- Professional Services

More than **7,500** customers worldwide rely on New Era services and solutions.

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Leveraging Technology to Improve Your Firm's Performance and Profitability

Overview of Approaches in Assessing Requirements

- Risk and compliance
- Currently owned hardware and software
- Infrastructure (office and remote)
- User technology maturity and adoption (training and support)

Common Mistakes Made

- Cloud is going to fix everything
- Assuming current infrastructure is adequate
- Training or lack of it
- Not knowing what each software package is capable and how to apply it
- Purchasing solutions based on need it vs already having it
- Manual vs Automated

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Leveraging Technology to Improve Your Firm's Performance and Profitability

Technology Overview and Rapid Changes

- Most firms own (hardware and software) which is needed to practice law but feel they need additional products based on advice of internal IT staff and vendors
- Gen – X/Y/Z are more proficient in most of the firm's desktop applications and require less support staff
- Secure Access to applications from anywhere is not an option it is a necessity
- A Laptop is a Laptop, and a Desktop is a Desktop
- Lack of Security Awareness will be the downfall of most firms in reputation and damages
- Lack of advanced and tailored training programs reduce firm productivity by 60%
- Machine Learning is changing some areas of law and put other areas at risk

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Leveraging Technology to Improve Your Firm's Performance and Profitability

Process and Efficiency Analysis

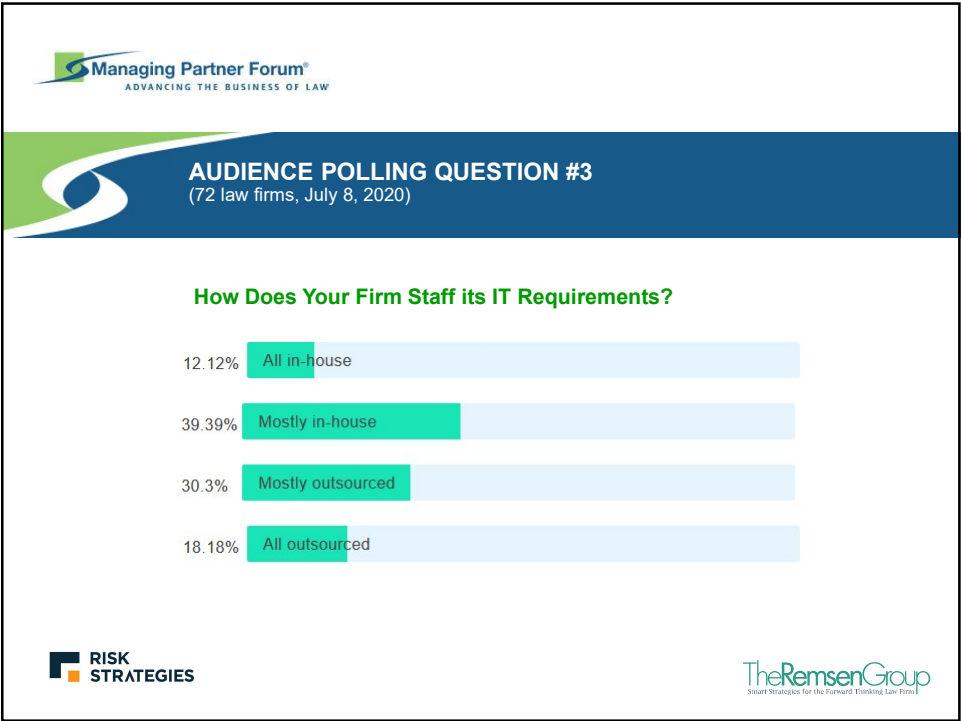
- In smaller to midsize firms, Client/Matter Intake should be examined based on how many matters are changing in a given period, but is not for everyone.
- Conflict and Records Management should be evaluated
- Support staff analysis has been scrutinized because of COVID
- Gain knowledge thru performance tools and provide "ready" access to decision makers on a weekly basis
- WIP to Invoice...to Collections is a must

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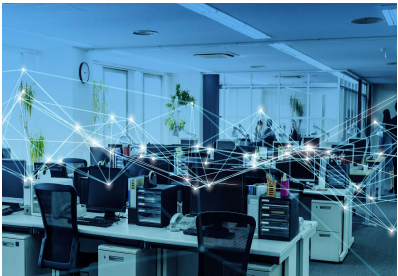
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Typical Ways We Work Remotely

- Local computer, cloud/web applications and VPN combination
- Connect to a computer in the office (LogMeIn, Remote Desktop)
- Remote Access Server (Citrix, Terminal Server)



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What Is Necessary To Support This New Normal?

- Full Productivity Without Barriers
- Security & Compliance
- Communication & Collaboration
- Employee monitoring
- Support/Helpdesk

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Common Remote Access Issues

Local Computer

- Disjointed parts, security concerns

LogMeIn/Remote PC Solution

- Sluggish performance, no Audio/video
- "The office network" still needs to be available

Remote Server (Citrix, Remote Desktop)

- Inconsistent from desktop experience
- Application compatibility issues
- Contention/performance
- Complex and expensive
- "The office" still needs to be available



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Desktop-as-a-Service

- Cloud's best kept secret!
- What is it
- Key benefits
- What other firms are saying
- Providers and options

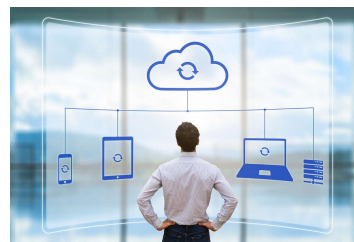


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What's Next

- The time is now
- Get decision makers on board
- We've always done it that way* is done
- IT is not an expense, it's an investment.
- Budgeting for IT has to change.
- Shift from Cap-ex to Op-ex



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AUDIENCE POLLING QUESTION #4
(72 law firms, July 8, 2020)

When it Comes to Adopting Technology to Improve Firm Performance, Our Firm is...

13.79%	"Early Adopter" - visionary, well ahead of most firms
51.72%	"Early Majority" - pragmatic, toward the front of the pack
31.03%	"Late Majority" - conservative, following the lead of others
3.45%	"Laggards" - skeptical, well behind most other firms



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GUIDANCE FOR LAW FIRM LEADERS

- Demonstrate Care for People, Clients and Community
- Stay Educated and Updated
- Think Strategically
- Communicate Clearly and Frequently
- Keep Open Communication Lines
- Stay Cool, Calm and Collected
- Refer to the Experts
- Maintain Credibility, Reliability and Intimacy



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MPF RESOURCES

- MPF Website – www.ManagingPartnerForum.org
- *The MPF Weekly*
- MPF Webinars and Handouts
- Next Up: **You Tell Us!**
- MPF Leadership Conference – Sept 30-Oct 1, 2020
- MPF Listserv and MPIE Conference Calls
- Webinars for Your Firm or Organization



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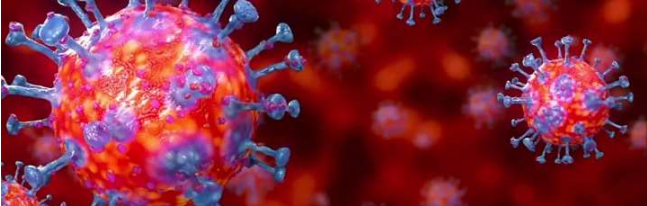
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The Managing Partner's Guide to IT Audits

LEE HOVERMALE AND DON CHAMPAGNE

An Information Technology Audit is the examination and evaluation of the firm's information technology infrastructure and its policies and procedures to determine whether the IT systems are up and available at all times, are safeguarding the firm's assets, safeguarding data integrity and operating efficiently to achieve the firm's established goals and objectives, including the firm's responsibility to protect its clients' data. IT auditors examine not only physical security controls but also overall business and financial controls that involve the IT systems to determine the risks to the firm's information assets and help identify ways to minimize that risk.

An IT Audit is not about ordinary accounting controls, traditional financial auditing, or compliance testing. However, the auditor will assess the design and efficiency of controls to determine whether they are suitable to properly mitigate risk. Risk factors include system-related issues, change management and vulnerabilities and other factors related to your technology. In fact, a company's IT infrastructure brings a unique risk to the firm that would not exist without IT being present.

For example, some of these risks include:

- Cyber-attacks through website or hosted platforms
- Infection by virus or malicious software
- Denial of service attacks
- Ransom attacks
- Phishing emails
- Loss or leakage of confidential information

Your reliance on your IT department or outside IT service provider can also be a risk depending on their technical ability and staffing level for the services expected of them. Without periodic evaluation and examination, these risks can become reality and go unchecked for extended periods of time.

As the firm's chief executive officer, you are the person ultimately responsible to ensure that the IT systems and controls are aligned with the firm's goals and legal requirements and are being managed, maintained, updated and kept current. In many cases, you are relying on your COO, an internal IT professional and/or your outside service provider to manage these risks. However, that reliance does not replace your ownership of this responsibility. It is therefore imperative that you understand what systems and policies are involved in protecting the firm's data, how they work and the level of risk you and your firm will accept. When it comes to the acceptable level of risk, you should determine your Recovery Time Objectives (RTO) and your Recovery Point Objectives (RPO) and the cost per day of the firm being shut down. These metrics should be identified and included in your overall Disaster Recovery/Business Continuity plan. The development of a DR/BC plan should start with a Business Impact Analysis (BIA) which addresses these needs by practice area, office and for the firm overall. If your firm has not formalized a DR/BC plan for all potential disasters, you should begin that process. However, that is a subject for another time.

RTO is the length of time that a service level within your business must be restored after a disaster or disruption to avoid unacceptable consequences associated with a break in business continuity. For example, most firms feel that they cannot be without email for more than one day. The RTO for email would be 24 hours. Your IT system should, therefore, be designed around being able to meet this RTO. RPO is the maximum period in which data might be lost from an IT service due to a disaster or disruption. For instance, email may be needed within 24 hours, however, you may feel that your time and billing system can be down for one week before it negatively affects the business. These are metrics that you must plan with your management team before deciding on your IT system design. These metrics should be published to the firm to set the expectation with the partners and will be what you will be graded against when a disaster occurs. Your internal IT department

or outside service provider should be keenly aware of your specific RTO's and RPO's and manage to them. Of course, the level of risk you are willing to accept is always based on the cost to cover that risk. This is where an experienced IT consultant can assist you with developing your DR/BC plan and your IT system to meet those requirements.

To be certain that your IT system is being managed and maintained to meet these requirements, it is best practice to have an IT audit performed periodically to document your compliance level and provide a roadmap for remediation when needed. This cannot be performed by your own IT department or service provider as they are the ones actually being audited. As you know from experience, there are many issues that arise in a normal business month that affect your IT systems. Some are more problematic than others and some are down-right disasters. Fixing problems during a crisis is often done with the goal to fix it ASAP. Some fixes are just temporary or workarounds. After every disruption event, your IT person or vendor should document the changes made in your system and prepare a post-mortem written report for you and your COO that explains what happened, why it happened, lists what needs to be done to permanently fix the problem along with the cost of the fix. Unfortunately, most IT people have difficulty with documentation and these follow-up steps get lost once the crisis is averted and they get back to handling their backlog of work that built up during the crisis. Your COO is responsible for the management of his team and should be managing this process.

Other areas that cause a system to fall out of compliance include:

- The time involved to maintain the infrastructure is often put on the back- burner due to your IT department's workload;
- Delaying infrastructure refresh of hardware and updating software;
- Cost of maintaining IT; and
- Lack of understanding the consequences of not performing regular maintenance and refresh.

Over time, your well-designed system is no longer configured the way it was initially and could eventually result in a slowness in your system causing the productivity of your attorneys and staff to suffer and ultimately a crash/outage. For these reasons, it is best to bring in an independent third-party IT auditor to verify and evaluate your IT systems.

An IT Audit should cover the following areas:

- Review of all documented policies and procedures, IT budget and actual IT spend
- Review of DR/BC Plan including RTO & RPO
- Basic internal & external security scan
- Patching process and status (servers, network devices, workstations)
- Endpoint security
- Network file share security
- Backup Redundancy
- Offsite backups and failover sites
- Sample file level data recovery
- Ransomware attacks prevention and response processes
- Active Directory accounts review
- Password policies (User and IT systems)
- Encryption (including server drive level encryption)
- Wireless network security
- Version status of applications
- Security logs archiving
- Review age of infrastructure hardware (servers, storage devices, network devices, switches, workstations, etc.) in all locations
- Review of physical server rooms, UPS, cooling systems/ventilation, etc.
- Interviews with executive leadership, attorneys and staff around feedback of systems and IT support
- User services and training

This may seem daunting, but every law firm, regardless of size, must deal with these issues or face the cost of downtime from an event that could probably have been averted with proper planning and regular system maintenance. An IT consultant can help you and your COO navigate these waters by explaining your technology, supporting your IT department as a resource for the more complex issues and solutions and providing on-going strategic advice to you and your management team.

Lee Hovermale | Chief Executive Officer, FlexManage
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Don Champagne, CPA, CGMA | Regional Director, FlexManage
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4 IT MYTHS: WHAT MANAGING PARTNERS NEED TO KNOW

Managing partners at small and mid-size law firms have enough to worry about – from day-to-day management to long-term growth and strategies – that it can be overwhelming to keep up-to-date on all of the IT options available to your firm.

The right technology will ultimately support your firm's growth and readiness for the future. As such, we will examine 4 common IT myths, set the record straight, and explain what you need to know to be prepared for the future success of your firm.

MYTH 1: *There Are So Many Reasons Not to Move to the Cloud*

There's little doubt that as a managing partner who is responsible for your firm's IT, you are considering cloud options. Despite the seemingly vast acceptance of cloud, it may still feel new or overwhelming, particularly when it comes to moving your entire law firm to the cloud.

A common misconception is that cloud is less secure. While it is natural to have some reservations about migrating to new technology, the overwhelming evidence is that cloud is actually more secure than legacy, on-premise systems. There are many other things your firm likely outsources, so it may be easier to think of cloud as another way to outsource. For example, many firms rent their office space, rather than purchase, work with recruiters to hire, and use CPS to do their taxes. Cloud should be no different. Rely on the people and technologies that do their specialties better than you, so that you can focus on what you do best – practice law.

If you are hesitant because you think cloud is a trend or it is too complex, rest assured that cloud will actually simplify your IT. Many individuals are already using cloud in some capacity, like for email (i.e. Microsoft Office 365, Gmail), phone (i.e. Skype, Zoom), or messaging and collaboration (i.e. Slack, Basecamp). Cloud is the future of technology.

Rather than focus on the reasons "why not," look to the many reasons firms decide to make the change. Cloud has key inherent benefits, such as security and backup, and allows you to simplify your IT by removing hardware and infrastructure while adding business continuity.

MYTH 2: *Backup is Business Continuity*

Far too many people believe that if their data is backed up, their business is safe. The reality is that backup is only one piece of business continuity. As a managing partner, you must focus on the entire strategy to ensure that after a failure, your firm gets back up and running with as little loss of productivity as possible.

There are several scenarios to consider when your firm would require backups; one being natural disasters that could cut

power to your offices and even access to the physical location including computers and servers. The more likely scenario is one that impacts only your firm, like hardware failure, system corruption, server or application malfunction, or cybercrimes. In cases like these, your business continuity plan is exceptionally important since only your firm is impacted and you want to prevent client attrition to other firms. Time is of the essence.

There are several types of business continuity systems and some are much more expensive than others. To determine what's right for your firm, first ascertain what amount of time is acceptable for an outage, whether that be measured in hours or days. Figure out when the impact of an outage becomes too costly. This is known as the recovery time objective (RTO), an acceptable downtime window. For example, if your practice management server is out, within how many hours must it be restored to avoid unacceptable consequences? It is vital to select a business recovery platform that brings your servers and all applications back online within your RTO. Weigh this against the costs of various business continuity platforms to focus on the appropriate solution for your firm.

No matter what business continuity system you choose, it has to be sized correctly to your firm and be able to scale as your firm changes. It is also ideal to have multiple backups made per day and the entire process must be managed, continually monitored, and tested.

MYTH 3: *Security is Only for Large Firms*

In the past, managing partners believed that cybersecurity was an expensive and unnecessary endeavor for their small or midsize firm. The reality is that cyberattacks have become too widespread for you to ignore. The high-profile cyberattacks we read about in the news usually focus on large, global organizations, but according to Verizon's 2018 Data Breach Investigations Report (<https://enterprise.verizon.com/resources/reports/dbir/>), **58% of all cyberattacks target small businesses.** Smaller organizations are typically easier to breach because of their lower security standards, and it only takes one improperly secured device for a breach to occur.

While cybercriminal activity could be politically or socially motivated, it is most often simply to make money. In phishing

schemes, for example, cybercriminals send out thousands of emails and wait for one person to make a mistake, click on a link, and provide sensitive data. This information, in turn, is used to access important accounts and can result in huge financial losses.

The evolution of malware makes a breach particularly dangerous for your firm. Rather than only impacting a single device, malware effects all devices on the network, all applications and data, and can effectively grind your firm's operations to a halt. The latest phishing malware allows for cybercriminals to take control of a firm's email system, usually Office 365. These tactics have changed how small and midsize firms need to protect themselves.

So, what does a comprehensive security plan look like for a small and midsize firm? Any good security system will be multi-layered. Consider the example of securing your home: You lock your doors and windows, close up your garage, set an alarm, and perhaps also install security cameras. You would not consider leaving your front door unlocked just because you armed your security system. The multi-facets are key to protecting your home and valuables, just as several precautions need to be taken at your firm.

A comprehensive security plan should include:

- Email filtering software scans all incoming messages for spam and other harmful attachments. It may reject or redirect messages that are flagged as potentially harmful.
- It is not just email that needs protection. Any application that transmits data, such as collaboration tools, needs to have security, whether it be built into the program or used alongside it.
- Antivirus and anti-malware software will find and remove immediate threats from your systems.
- Every firm, regardless of size, needs a business grade firewall that sits between a firm's internal network and the internet and serves to prevent unwanted access to the firm's systems.
- The vast majority of law firms require remote access so lawyers can work from home, client offices, or the courtroom. As such, firms often have a VPN or other remote desktop solution in place. It is crucial to ensure your remote access solution is secure, usually through encryption and authenticated connections.
- Multi-factor authentication (MFA) adds an additional layer of security to guard against a compromised password.
- Additional encryption tools at the email, desktop, and server levels should be considered to provide your firm the best protection to meet your needs.

Remember, security is a process and protection needs to evolve as the threat landscape changes.

MYTH 4: *Technology is Enough*

It is vital for law firms to focus on technology to protect their systems and data, but a firm would be in serious danger if it stopped there. The people using your IT systems – your attorneys, paralegals, and support staff – are the single greatest threat to your organization. It is easier for a cybercriminal to deceive a person than technology, so even with all of the right technology precautions in place, they are only effective with appropriate education and policies.

Education and training are essential for everyone, whether that be held in person, via webinar, or through reading materials and video tutorials. It is crucial to also run tests throughout the year to uncover areas where risks remain and additional training is necessary.

The most likely tool to be used to compromise your systems is email. According to Verizon's Annual Data Breach Investigations Report (<https://enterprise.verizon.com/resources/reports/dbir/>), **more than 92% of malware originated in an email link**. Choose email policies that will work best for your firm. For example, most companies still maintain webmail even though users outside of the office prefer to access their email via remote access, smartphones, or tablets. If webmail is not being used, turn it off. Many firms also choose to restrict public email domains, such as Gmail and Yahoo.

Here are some technology policies to consider:

- Rather than give remote access to everyone in the firm, provide logins only to those lawyers and staff who need it.
- Place appropriate restrictions on any guest Wi-Fi available to visitors in your office.
- Content filtering technology can restrict sites that are potentially harmful and prevent users from accessing them.
- Standardize how your firm works. If your firm uses collaboration or filing sharing tools, choose a single, vetted platform that everyone must use, rather than leaving it up to each individual or department.
- Make it a part of your process to continually assess and change your firm's policies as you see what works and what needs improvement.

CONCLUSION

IT is more complex than ever with changing needs and evolving technologies. It is important to make appropriate, educated IT decisions for your law firm to better prepare your firm for future successes. The right technologies and policies will modernize your practice and improve efficiency.

WHY MOVE YOUR ENTIRE DESKTOP TO THE CLOUD

by Morris Tabush, Founder & President, Tabush Group



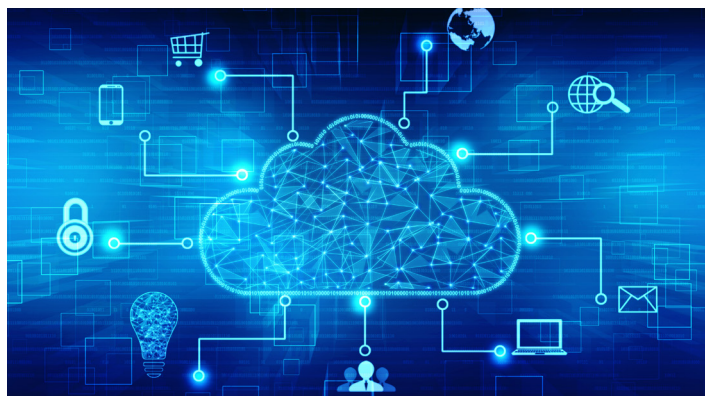
We often have discussions with our clients about the cloud. As technology continues to progress, moving to the cloud has changed from a matter of “if” to “when.” Cloud makes more and more sense each day.

One of the most common applications that clients ask us about moving to the cloud is Intuit’s QuickBooks® a very popular accounting program for small businesses. As companies are operating beyond the physical walls of their office, they find a strong need to provide remote access to their QuickBooks data, either to outside accountants or to employees. While Intuit does have a web-based product called QuickBooks Online, most businesses and CPAs prefer to stick with the desktop version for the functionality, interface, and flexibility it offers.

Moving QuickBooks Pro or Premiere (the desktop versions) to the cloud has been possible for quite some time. Like most cloud services, it offers several advantages, including being able to access it from anywhere, having robust security and backups, and not having to purchase or maintain a QuickBooks server. There are many companies offering this using backend technologies, such as Terminal Server or Citrix, to deliver the application. Today, however, there is another alternative to consider.

Moving QuickBooks to the cloud also comes with some limitations. Printing is the most common, as the technologies used to deliver cloud applications can present issues connecting to certain printers. Other constraints include integration with other applications and use of plug-ins or customizations.

Typically, when a company only has one or two applications in the cloud (or even worse, applications live in separate clouds), the applications become disconnected from each other. Actions like copy/paste, importing data, using plug-ins or add-ons (there are thousands for QuickBooks), or any type of custom integration becomes more difficult, if not impossible. Why? Because the desktop PC always acted as the amalgamation point of everything (applications, data, security, icons, and more), but all of a sudden not everything lives on that desktop. Rather, they reside in different places.



To provide an example, in order for QuickBooks to export reports to Microsoft® Excel spreadsheets, Excel must live in the same “space” as QuickBooks. Thus, if your QuickBooks lives in a third party’s cloud, you will also need a copy of Excel there, which will be an extra cost and

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a separate installation from the Excel you have local on your PC. Alternatively, you may use an add-on to connect QuickBooks to another database or application, for payment processing, or for another function that saves man hours. If your QuickBooks is hosted, the provider must specifically support these add-ons in order for them to work.

A NEW APPROACH

Rather than moving only QuickBooks to the cloud, many companies (ourselves included) moved the entire desktop to the cloud. Literally, the “hard drive” or tower that sits on your desk goes away and lives in the cloud. Everything on that desktop – from programs such as Office, QuickBooks, Evernote®, and Skype, to the shared drives, to the icons – all move to the cloud as well.

With this approach everything becomes instantly accessible from anywhere, but still functions like it is all on the same desktop – because it is! You are no longer limited by each cloud provider’s rules and systems, can choose to change or upgrade applications at your own pace, and can run a combination of cloud, desktop, and hybrid applications all in the same environment.

Best of all, once all of your desktops are in the cloud, which means that naturally your servers are as well, you no longer have to worry about the costs of maintaining

your own IT systems. Things like backups, remote access, disaster recovery, business continuity, hardware upgrades and replacement, and local IT support go away. Everything is maintained by the cloud provider and resides in data centers built with more security and redundancy than most businesses would or could do on their own.

When it comes to cost, moving only QuickBooks to the cloud typically costs around \$60 per user per month. This is a completely new cost to your firm – it does not eliminate or reduce any of the existing IT costs. Moving desktops to the cloud, on the other hand, while typically more than \$60 per month, eliminates the many costs involved with buying, supporting, and maintaining IT.

Several years ago, it may have made sense to move only some data, systems, or programs to the cloud. Today, companies are moving their files, their phones, and even their desktops to the cloud. If you’ve been thinking about moving an application, such as QuickBooks or any Windows-based program, to the cloud, it is worth your time to consider moving your desktops instead. You may be surprised at the results, cost savings, efficiencies, convenience, and problems it eliminates.

And this is why we developed Bxotop – our cloud IT solution for small to midsize businesses.

