

# 10 Tech Tools for Entrepreneurial Lawyers

**Presented by:**

**Chris Brown**

Founder of Venture Legal & Contract Canvas

[chris@venturelegalkc.com](mailto:chris@venturelegalkc.com)

**John Benson**

Solutions Architect at Stinson Leonard Street LLP

[john.benson@stinson.com](mailto:john.benson@stinson.com)

*This outline is very general in nature and does not constitute legal or technical advice. Readers with legal or technical questions should consult with an attorney or technical professional prior to making any decisions.*

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## VPN Providers

*Stay protected on public WiFi networks.*

When you connect your device (phone, tablet, computer, etc.) to a public WiFi network (for example, coffee shops, airports, etc.), other people on that network may be able to read the data you download and upload through that network. As a lawyer, that obviously creates risk for you and your clients.

One way to protect that data is to use a VPN (a Virtual Private Network).

When you log into an encrypted VPN, the data you download and upload will be encrypted between your device and the server. This means that other devices on the same network cannot read that data. However, once your data leaves the VPN server and enters the internet at large, it will no longer be encrypted.

Even though VPNs do not provide end-to-end encryption, it is still a good practice to use a VPN when on public WiFi networks.

Some large law firms likely provide VPN access for their lawyers (but it is often up to the lawyer to make sure they are connected to the VPN).

For smaller firms, you probably do not have a VPN set up. In those scenarios, it is a good idea to purchase a subscription to a VPN provider. The costs range from \$50 to \$150 per year per user.

For a helpful guide of VPN providers, visit [www.cnet.com/best-vpn-services-directory](http://www.cnet.com/best-vpn-services-directory).

(As a side note, you should make sure that your VPN provider is trustworthy. Since they are the ones encrypting your data, and since all of your data will be traveling through them, it is wise to conduct due diligence on the provider. Another good idea is to make sure you choose one based in the US, and which acknowledges in their terms that they are governed by US law.)

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## Password Managers

*An easy and inexpensive way to protect your login credentials.*

Most computer hacks are the result of human error—a human clicking on a bad link in an email, giving their password to a bad actor, or simply using low quality passwords (or the same password) for multiple apps and websites.

One way to protect your and your clients' data is to use unique, strong passwords on all apps and websites. This means using a password with at least eight characters and a mix of regular letters, capital letters, numbers, special characters, and spaces.

While you can try to keep track of all of your passwords manually, it is often best to use a password manager. These tools can help you to create much longer passwords that meet the criteria above and they integrate with web browsers and iOS and Android phones. When you visit a log-in page, the app takes over and auto-fills your username and password for you. Moreover, some password managers keep track of hacks across the internet and they can alert you if you need to change your password.

Two great options are LastPass ([www.lastpass.com](http://www.lastpass.com)) and 1Password ([www.1password.com](http://www.1password.com)). Pricing is usually about \$3 to \$10 per month per user, depending on the number of users and features you need.

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# Two-Factor Authentication

*Keep your accounts safe.*

When you log into a website or app, you normally provide your username (or email) and a password. Thus, anyone who gets those can log in as you and take unauthorized actions on your account. And with the recent explosion of data breaches involving login credentials, it is smart to take extra steps to protect your most sensitive accounts.

Two-Factor (or sometimes Multi-Factor) Authentication is one way to accomplish that extra security.

Rather than relying on just a username and password, when two-factor authentication is offered and enabled, you'll be required to provide an additional piece of evidence (or factor) to log in. For example, after inputting your login information, you may be required to type in a code that is texted to your phone. Or, for even better protection, you can use a USB device as a key or download an app that can serve that same purpose. One app-based company is Duo Security ([www.duo.com](http://www.duo.com)), which runs from free to \$9/month.

For a list of companies that support two-factor authentication, visit [twofactorauth.org](http://twofactorauth.org).

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## Email Providers

*Don't use yourname@yahoo.com.*

This may not be a concern for lawyers at medium and large law firms, but all too often solo and small firm lawyers use free email providers.

At the outset, using an @yahoo, @gmail, @aol, or similar email address, may appear unprofessional to many clients and colleagues. On a more serious note, using a free email platform creates added risk for you and your clients. For example, some free email providers read every email you send (with AI) and use what they learn to serve you ads. You should obviously try to avoid that.

Two easy solutions are G Suite (by Google) and Office 365 (by Microsoft). They both offer custom email addresses (yourname@yourdomain.com).

- G Suite:
  - \$6 per month per user.

- Includes web-versions of Google Docs, Google Sheets, Google Slides, cloud-storage, calendar, and more.
  - They also offer more expensive tiers with more services.
  - Learn more: [gsuite.google.com](https://gsuite.google.com).
- Office 365:
  - Starts at \$6 per month per user.
  - Includes web-versions of Word, Excel, and Powerpoint.
  - For \$15/month, you also get desktop-versions of Word, Excel, and Powerpoint.
  - Learn more: [products.office.com](https://products.office.com).

Setting up email is fairly easy, but does require some technology skills. Generally speaking, once set up, you shouldn't experience many tech problems.

If you would like help setting up your account, a great local resource is [www.umzuzu.com](http://www.umzuzu.com).

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## Email Marketing & Email Lists

*Stay in front of prospects and clients.*

Email marketing is one of the most cost-effective marketing tools today. Additionally, when you build an email list, you will have direct access to your prospects and clients and greater control over what you do with that list. Moreover, you will not be at the whim of a social media platform that is constantly changing rules and algorithms.

Step one is building your list. You should create forms on your website, your social media profiles, and elsewhere so people can sign up. If you have any digital intake forms, add it there too.

Keep in mind however, that you should try to avoid adding people to your list without their consent. For starters, doing so violates the Terms of Service of most email marketing platforms. On a practical level, doing so will likely annoy recipients, increase unsubscribe rates, and harm your email analytics.

Step two is creating and sending emails. You should strive to send your emails on a regular basis, for example quarterly or monthly. You can create them on your own or you can use a free or paid email marketing platform like Mailchimp ([www.mailchimp.com](http://www.mailchimp.com)) or Constant Contact ([www.constantcontact.com](http://www.constantcontact.com)). Both offer free plans if your list is small. When it begins to grow, the pricing is still reasonable. Mailchimp starts at \$10/month while Constant Contact starts at \$20/month.

An added benefit of using an email marketing platform is that they make it easy for you to comply with the CAN-SPAM Act (a federal law requiring emails to include addresses, unsubscribe links, and more).

Learn more about CAN-SPAM at

[www.ftc.gov/tips-advice/business-center/guidance/can-spam-act-compliance-guide-business](http://www.ftc.gov/tips-advice/business-center/guidance/can-spam-act-compliance-guide-business)

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## Project/Practice Management Tools

*Stay organized to reduce mistakes and increase your productivity.*

Let's admit it, keeping a project or practice management system up to date is a pain. It takes a lot of time and attention to create tasks, update tasks, check off tasks, etc.

But that time and the discipline it takes to actually use your project management tool will create freedom for you to spend more time on the tasks that matter most. Since you will always have a snapshot of your "to-do" list, you can easily prioritize your day, week, month, and year. Plus, you'll be less likely to miss important deadlines if you create due dates for tasks in your system.

Moreover, many law-specific practice management tools allow you to automate certain aspects of your work, from sending engagement letters to collecting client documents, invoicing, and more. And most systems integrate with other online tools, to make your life even easier.

Here are a few examples of practice management tools, with a couple non-law tools included:

- [www.clio.com](http://www.clio.com)
  - [www.practicepanther.com](http://www.practicepanther.com)
  - [www.mycase.com](http://www.mycase.com)
  - [www.meruscas.com](http://www.meruscas.com)
  - [www.asana.com](http://www.asana.com)
  - [www.basecamp.com](http://www.basecamp.com)
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## Research Tools

*New ways to research to help you win.*

Everyone knows about Westlaw and Lexisnexis, but the times are changing and new research tools are becoming popular among lawyers.

These new tools are analyzing the same data but, in many ways, presenting it in entirely new formats. You can compare different courts to learn about the types of cases they hear and how often they grant motions. You can learn about how a judge is likely to rule based on prior, similar cases, and find cases they prefer to cite in their opinions. And you can use visualization tools to better understand your current case.

A few leading providers are Ravel Law ([www.ravellaw.com](http://www.ravellaw.com)), Casetext ([www.casetext.com](http://www.casetext.com)), Casemaker ([public.casemakerlegal.net](http://public.casemakerlegal.net)), and Fastcase ([www.fastcase.com](http://www.fastcase.com)).

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## Cloud Storage

*An easy way to access your files in the cloud (and backup your files).*

Cloud storage is a way to save your files to an internet-connected hard drive. The drive can be yours, in your possession, although it is more commonly not in your possession. When you save your files to the cloud, they can then be accessed from any internet-connected device, provided you have the proper credentials to access those files.

Depending on the provider you use, you will also be able to save a local copy of all (or some) of your files on your individual machine. Thus, you can continue working on your files even when offline and when you reconnect to the internet, the files will synch.

In addition to having greater access to your files, you can share your files with clients and colleagues. There are several means to do this. You can share a link (which anyone with the link can open) or you can share a password-protected link which anyone can access, but only those with the password can open. From there, you can set expiration dates on links, and more. You can also create shared folders that allow more than one user to access and edit the contents of the folder. And with some providers, you can also turn on version tracking to help you track the history of your files.

Moreover, if your personal device crashes or is stolen, you don't necessarily lose all of your files. Rather, they will still exist in the cloud so when you get a new device and log in with your credentials, you will once again have access to your files. In this way, cloud storage serves as a backup.

As with any tech tool, the most common way your cloud storage may be breached is due to human error (for example, clicking on a nefarious link in an email). However, provided you are diligent about creating a smart password, using two-factor authentication, and not sharing your login credentials or clicking on dangerous links, your data should be safe in the cloud. With that

said, if you are in charge of safekeeping the KFC secret blend of herbs and spices, you might be better off leaving that in a physical safe.

As an added layer of protection, some cloud-storage providers offer HIPAA compliant tiers. These will have added security features and are designed to comply with the requirements of HIPAA.

Four of the leading cloud-storage (and backup) solutions on the market today are Dropbox ([www.dropbox.com](http://www.dropbox.com)), Box ([www.box.com](http://www.box.com)), iCloud ([www.icloud.com](http://www.icloud.com)), and BackBlaze ([www.backblaze.com](http://www.backblaze.com)). Pricing runs between \$5 and \$25 per user per month.

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## Cloud Accounting/Billing

*Your financials are your most important metric.*

Part of the reason it is easier than ever to start and run your own law firm is the increase in cloud-based tools that make running your firm less expensive and faster.

While you will still probably need an accountant or CPA to help you on an occasional basis (monthly, quarterly, or just during tax season), you can run your own books day-to-day. Doing this will also help you better understand your firm's most important metric: the financials.

Moreover, when you run your accounting in the cloud, it becomes easier to accept credit and debit card payments online. Sure, you'll pay a processing fee, but the time saved in not chasing down paper checks and depositing them will be worth the processing fees. Plus, it will increase your collection rate and speed up your collections.

Here are a few good resources for accounting:

- **Xero, Freshbooks, Quickbooks:** All of these platforms allow for daily account reconciliation, invoicing, expense tracking, and more. The pricing is similar among the platforms and runs between \$10 and \$50 per month depending on your needs.
  - Learn more at [www.xero.com](http://www.xero.com), [www.freshbooks.com](http://www.freshbooks.com), and [quickbooks.intuit.com/online](http://quickbooks.intuit.com/online).
- **Gusto:** Gusto is a cloud-based payroll and benefits provider. You can run payroll with just a few clicks (or automate it), pay contractors, reimburse employees and contractors, and sync your payment records with your cloud-based accounting platform. The base package is \$39/month plus \$6/month per employee. You can also select higher tiers for added services.
  - Learn more at [www.gusto.com](http://www.gusto.com).

- **Track1099.com:** If you run your own firm you will almost certainly experience the fun of running 1099s every year. You can pay your accountant to do this, or you can use an online provider like Track1099.com. For about \$2 per 1099, they will scan your cloud-based accounting records to determine which contractors need a 1099, help you collect the information you need, and file the 1099 with both the contractor and the IRS.
    - Learn more at [www.track1099.com](http://www.track1099.com).
  - **Stripe/LawPay:** If you want to accept credit card payments from your clients, you can utilize the services of a credit card processor such as Stripe and LawPay, which integrate with many cloud accounting tools. If you use your trust account on a regular basis, then LawPay may be better for you. However, if you do not use your trust account much (for example, if you always bill after providing services), Stripe and other tools are just as effective and sometimes better.
    - Learn more at [www.stripe.com](http://www.stripe.com) and [www.lawpay.com](http://www.lawpay.com).
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## Electronic Signatures

*Make your clients love you with e-signatures.*

The Federal Electronic Signatures in Global and National Commerce Act (E-Sign Act) provides a general rule of validity for electronic records and signatures for transactions in or affecting interstate or foreign commerce. In addition, many states have adopted some form of the Uniform Electronic Transactions Act (UETA).

As a result, most contracts and other documents can be signed using electronic signatures unless a statute or other rule requires otherwise (for example, in many cases, e-signed wills and trusts may not be enforceable).

Generally speaking, e-signatures will be binding if (a) the signing party intended to sign the contract; (b) the signing party consents to do business electronically; and (c) the electronic signature platform saves and retains the contract itself and an associated record that reflects the process under which the signature was obtained.

Two very helpful resources for e-signatures are DocuSign ([www.docusign.com](http://www.docusign.com)) and HelloSign ([www.hellosign.com](http://www.hellosign.com)). They both cost around \$10-\$40 per month (although HelloSign does have a free version) and they both allow you to send contracts to multiple parties for signatures and add non-signing recipients as well to receive copies. After the contract is fully signed, all of the recipients on the envelope get a final copy of the contract. Both platforms also obtain the consent required under the law and they both create court-admissible audit trails showing when and where the contracts were opened, when and where they were signed, and more.

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