# Firm Infrastructure: Build Your Practice On A Solid Technology Foundation

Submitted by James McGarvey and Robert F. Loughran

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After quality legal expertise, one of the single most important elements of a successful and well run immigration firm is its technology infrastructure. A firm with a well designed infrastructure leverages all aspects of its technology to improve productivity, communication, and quality of work product for both internal staff and for its clientele. Implemented well, the technology infrastructure provides a stable base for all of the practices' operations to run smoothly and efficiently. Implemented poorly, the technology can be a serious impediment wasting valuable time and resources and can even damage a firm's credibility and reputation.

Sadly, it is a common mistake of many firms to treat their infrastructure as an after-thought, leaving it out of annual budgets, buying on a strictly crisis basis, making infrastructure purchases based solely on cost, and growing without a cohesive, unified technology plan. This is "penny-wise and pound foolish." It always ends in frustration, wasted money and a technology infrastructure that is a hindrance and an aggravation rather than a help.

However, this can be avoided easily by focusing on three basic objectives: know where you want your technology to take your practice, have an overall plan for getting there, and allocate the appropriate resources (both money and staff) to get there.

## DEVELOP A PLAN

Generally speaking, you will want to develop a long-term and a short-term plan, with the long-term developed first to guide the overall goal set. Because technology changes so rapidly, long-term should be about 5 years into the future and fairly broad, and short-term should be the next 12-24 months and very specific. Break the goals into discrete, component tasks to be accomplished, which will provide you with a set of easily manageable modules that can be researched, budgeted and scheduled. Be sure to identify which of these modules are interconnected. For instance, if you determine that within the next 24 months you want a firm-wide intranet (short-term goal) to facilitate a seamless collaboration environment for your growing staff (long-term goal), you may also need to purchase a dedicated web server to handle the additional load (short-term goal), and spend the time with staff organizing all of the firm's documents into a systematic, organized hierarchy (short-term goal) before you are ready to deploy an intranet. Plotting out your core technology objectives and prioritizing them will help you to avoid bad purchase decisions, technology dead-ends and wasted time and money.

Few attorneys have an extensive and professional level of expertise in Information Technology and Network Infrastructure. However, a broad understanding of the basic technologies that apply to law firms in general and immigration firms in particular is important. Although you do not need to understand all things about technology, it is important to maintain a conceptual understanding of how your systems work, your technology options and how technology is changing. This is necessary so that you can asses your current technology needs and adjust your plans as new technologies become available.

## CHOOSE YOUR TECHNOLOGY TEAM WISELY

Most attorneys are not technology experts; therefore, it demonstrates a base level of prudence that you work with qualified, competent technology professionals when it comes to your technology foundation. You will inevitably be relying on the experience, judgment and good advice of these experts and in many cases you will be *blindly* relying on them to handle things you may not fully understand (much as your clients often have to blindly trust you for complicated legal issues). The quality of work they deliver will directly affect the systems on which your entire practice rests. It is also very important that the people you choose to enlist to handle your technology understand and appreciate your over all objectives and are fully committed to working *with* you to accomplish these objectives. Ideally, you want a team that is also willing to work with your budgetary considerations and will help you to minimize cost without compromising quality, growth planning, or reliability. A good technology team should even show you ways to reduce costs without having been specifically instructed to do so. Be wary of vendors whose primary goal is to sell you products or solutions regardless of whether they fit within your technology plans.

Generally speaking you have three broad choices when it comes to your technology team: (1) hire someone in-house; (2) hire an hourly IT service provider; or, (3) hire a flat-fee managed services firm. There are pros and cons to all three.

### IN-HOUSE

Hiring a full-time staff member (or team) means you have someone directly accessible and directly under your authority with whom you can develop a close and personal working relationship. You are also guaranteed that the IT staff member has no other priority than your systems, and that he is readily available, and your labor costs are controlled by an annual salary, so you know how much you will spend per year. If you find a top-notch technology manager, they can be a real boon to the practice. Pro-active system maintenance can be handled effectively to prevent system crashes, users have a familiar face they can trust and someone is on–hand who understands the firm's systems perfectly.

This option tends to be fairly expensive due to salary expectations, benefits and vacation. Even worse, often in-house staff will seek employment elsewhere after a few years leaving you without support for your crucial technology. When this staff member is out sick, on vacation or moves on, the firm may be placed in a vulnerable position as there may be only one person with any detailed understanding of how your technology infrastructure is configured. When you bring in the next IT professional the first few months may not be spent addressing identified problems, but rather cataloging the systems and figuring out why configuration choices were made and whether changing a system to improve one aspect will have negative consequences in another area. Technicians can be like economist and discussing a specific problem with three technicians may result in four to six implementation strategies from which to pick. Additionally, hiring your in-house technician can be problematic as it is extremely difficult to assess the competency, maturity and work ethic of an applicant before a hiring decision is made. Discovering after the fact that a person is unqualified can have disastrous consequences. There is also a built-in limitation with in-house IT; your firm will only ever have the breadth of experience and expertise of the people you hire yourself and they tend to become stagnant over time as they focus on the day to day tasks of maintaining the status quo instead of plotting a path into the future and leveraging emerging technologies. This is almost inevitable unless significant ongoing training resources are allocated.

In general, the ability of an in-house staff to provide broad scope technology consulting based on a wide spectrum of business experience will be less than other choices. This becomes particularly limiting when the systems have a difficult or obscure problem or when the firm needs to implement a new and unfamiliar technology.

## HOURLY IT SERVICES

Another common solution for many businesses is hourly IT services. This means that rather than hiring someone full-time, a firm hires a company with technicians (and sometimes consultants) available on an 'as-needed' basis for an hourly rate and can be called on for service or consultation when needed. This has the distinct advantage of allowing a firm to directly control its costs – you only pay for the service you receive. It also usually means that the firm can access a much broader range of expertise and experience than can generally be found with a small in-house team. However, an hourly outsourced IT solution requires someone within the practice to manage and monitor the work and labor costs. Also, you tend to get the technician that is available, it can be difficult to establish a personal relationship when the person working is a new face every time. Because this tends to be break-fix type work, it also usually means that items like preventative maintenance, system check-ups, strategic growth planning and project management and consulting often get overlooked or are actually declined in order to avoid extra hourly charges. This is a common, but short-sighted failing. You may also end up with several well executed projects that are not well inegrated, or worse still, backtrack on previous efforts and actually conflict with existing systems. Consistency of design and integration of systems are goals that can be expected to maximize efficiencies and therefore can lead to the creation of profits without raising legal fees. The hourly IT services model also makes it far more difficult to budget and predict your overall technology expenses since an unexpected system failure means unexpected labor (and hardware) costs to correct.

## MANAGED SERVICES

The third broad choice is to contract a flat-fee managed services company to provide full and complete outsourced IT. Not all companies that market themselves as "managed services" are equal and there is a wide range of variation in service level offerings. Generally speaking, a managed service company provides maintenance and management of your technology infrastructure for a flat monthly fee. Usually this is calculated by the number of workstations, servers, routers and firewalls in your network. A full service managed services company will provide monitoring, pro-active maintenance, reactive maintenance and a blend of remote support and on-site support. Often, they will provide a help desk and ticketing system that will allow users to directly get assistance via phone, e-mail or the web. They should also provide technology assessments regarding upgrades, replacements, and inventory. In short, a good managed services company can provide everything that you would expect from an in-house IT department, without sick-days, vacation or leaving the firm. Additionally, the flat-fee arrangement reduces the need for constant management of hours and labor and make budgeting simple (assuming the firm offers an all-inclusive plan). This option also allows a practice to leverage a far greater pool of technicians with a much wider range of expertise, experience, and competency than can generally be developed in-house. Another advantage is that many managed services companies incorporate consulting and strategic growth planning into their plans which can provide your practice with high-level consultancy as well.

In practice,"Managed services" can be a loosely defined term. The services provided under the term "managed services" can range from only monitoring to full-service, full blown outsourced IT and consulting. Pricing also varies considerably and it can sometimes be difficult to determine exactly what is and is not covered under a managed service plan from some providers or how beneficial those will be, which can make selecting a flat-fee managed services firm challenging.

Whichever route is most suitable for your particular needs there are a few guidelines are applicable to all:

1. Wherever possible, begin with recommendations from people you know and trust who know and trust good service providers or people and will vouch for their quality of service. Look for glowing recommendations, instead of lukewarm ones.

2. Always look at more than one option. Compare and contrast capabilities, history, experience, and overall approach. Remember that you are interviewing for a long-term partner for one of the most critical aspects of your business. Make sure that you choose a like-minded technology team, who is willing to work with you, and with whom you can comfortably work. You will be relying on their expertise, judgment, and communication skills for a long time, so invest the necessary time into due diligence.

3. Make sure that whoever you hire has *proven* experience. Look for a minimum of three years of real-world and real business experience. If you are looking for a service provider, make sure they have been in business for at least three years and have references from clients that have been with them for at least three years. It is a sad truth that many service providers are short-lived and can leave their clients in the lurch.

4. Ask for a variety of references, from a variety of different size clients and industries and a variety of tenure with the company. Check references and speak with clients who have received service from the company for a long time and some that have just signed on. Verify responsiveness and effectiveness. Things will inevitably go wrong; you need to know how the people you select handle themselves in a crisis.

5. Find out the qualifications of the staff. A higher headcount alone doesn't mean better service if all are low-level technicians. Make sure that they are adequately staffed both in numbers and in expertise to handle your needs; high-level technicians and engineers should be readily available. If possible, visit their offices and meet the staff, but remember, a flashy office does not mean competent technicians.

6. Be conscious of your budget but don't decide based on price alone. Whether it is an annual salary, an hourly rate or a monthly flat-fee, cheaper service almost always means less service.

Most importantly of all, look for people on whom you can trust and rely to help you chart your course through the challenging world of technology infrastructure. You want someone who is willing to partner with you to help you reach your goals. You will decide how to grow your practice through technology and what capabilities you want; your technology team will build you the solid foundation on which to base your growth.

It can be very costly to handle technology on an ad-hoc, do-it-yourself basis in an effort to minimize cost. Invariably this results in significant costs from wasted time, diverted attention, inefficiency, poor purchase decisions and downtime.

## THE BUILDING BLOCKS OF YOUR FOUNDATION: THE HARDWARE

Your practice will need equipment to leverage the technology available today. A virtual minefield involving equipment options, equipment needs and purchasing decisions awaits the new practice. The dizzying array of technical terms, arcane acronyms and often vague explanations of device functions can be intimidating and frustrating. Most times the people who are telling you what you need are the sales people, with a vested interest. As such, it can be very difficult to make an informed decision. This is why it is so important to have a trusted technology adviser. A good technology team will assess your options, weigh the advantages and disadvantages, and present you with viable choices, salient information to base your decision on, and guidance in making your choice. The final decision should always be yours, not your technology teams. Your IT advisor should inform and educate you, so that when you make your decision, it is an educated decision.

While every type of device varies in complexity and function, there are some simple ground rules you should always follow when faced with an equipment purchase, whether it is a server, a workstation, a router, a copier or a telephone system.

1. Whenever possible, get recommendations and feedback from people you know and trust who have direct experience with the particular device you are purchasing. While a collegues' success with the device you are planning on purchasing may not translate into a good fit with your operations, a product that has failed for your colleagues should almost always be avoided. Don't let price, financing, or marketing materials convince you otherwise.

2. Whenever possible, get a live, real-world demonstration of the device, preferably one where you can use it yourself. Some hardware devices offer 30 day trials to ensure operability and compatibility. A few manufacturers will allow you to tour facilities where the device is in use in the real world. Speak to actual client users and check references.

3. Always compare similar products from multiple reputable vendors. If, for instance, you decide as part of your technology plan that you need a large office copier/scanner/printer, talk with Konica-Minolta, Ricoh, Sharp and Xerox (to name a few). Compare and contrast the standard performance measures. For copiers, that means Pages per Minute (PPM- How fast it prints), Duty Cycle (How much it can print before it is expected to need maintenance), Print resolution (How detailed and sharp the prints are), Sheet capacity (How much paper it can hold without re-stocking), etc...

4. Look for quality warranty and maintenance service. All hardware eventually fails, so warranty and extended service are a vital necessity. On-site service is vastly superior to drop-off or depot service, particularly for critical devices such as computers, telephone systems, and network equipment. If one of these critical devices fail, it is not practical to box it up and ship it out for repair and then wait 2-3 weeks while a key piece of your infrastructure is down. Most manufacturers of this type of equipment provide at least next day on-site replacement guarantees for a monthly fee or an additional cost at time of purchase. For business critical devices or systems, the extra protection is necesary for business continuity.

   Keep in mind that additional warranties may not be necessary for non-critical devices that are immediately replaceable at reasonable cost. For instance; an $80 personal printer is usually both easier and quicker to replace than repair.

5. Whenever possible, purchase for the long term, based on your technology plan. For most technology devices the 'long term' should be understood to mean about 3-4 years. It is a

common mistake to buy a cheap 'temporary' device with the idea that when you need something better, you will buy it then. For example; a basic file server can range in price from $1,200 up to $8,000, depending on capacity, redundancy, performance and a variety of factors. While you may not need a top of the line server, buying a $1,200 file server with limited performance and capacity today, when your overall growth plan shows that you will have a 30% increase within the next year means that the server will need to be replaced in 12 months with a more robust and expensive server. Within a year's time you would have spent at least double in hardware alone, plus double the labor costs to install a server twice in a year and your practice will have spent some time in lost productivity while your underpowered server was limping along. Spending a little bit "extra" in the first place is vastly more cost effective in the long run.

6. Decide whether leasing, renting or purchasing is the best option for you. Operating costs, cash flow challenges during periods of growth or reduction, time and scheduling can all complicate budgetary considerations including your technology. While more expensive in the long run and potentially risky in terms of credit, leasing can provide an easy way to mitigate up front costs and allow for more expensive projects than might not otherwise be available to a growing practice. An additional consideration would be the tax ramifications of renting or leasing. You should consult your tax advisor regarding these considerations.

These general rules will help guide you through broad purchase decisions for hardware. Remember that each hardware device type has it own particular criteria, and that you should always look at how any new device enhances or adds to your overall technology plan. Any new device should fit within and supplement your technology plan. If it does not, or if it will require a re-working of your current systems to implement, you should take the time to re-assess your current technology plan or the need for a particular device. A new piece of hardware should not conflict with the shape or goals of your technology foundation.

## THE CONCRETE AND MORTAR OF YOUR FOUNDATION: THE SOFTWARE

While hardware tends to be fairly industry neutral, meaning that a printer or a database server are equally useful for a mining company as they are for an immigration practice, this is less true of software. The various software packages in use by your practice will directly affect the productivity, organization, and efficiency of your practice. These are highly specific to your particular needs. For most law practices, there are two specific areas of software that bear unique considerations for your firm: document generation, case tracking. Each of these areas of concern is unique to law firms in general and immigration practices specifically. Perhaps the most important considerations for all aspects of your software are attorney-client privilege, standardization of work product and data retention.

### DOCUMENT GENERATION

The practice of immigration law is particularly oriented to documents. Whether it is forms, pleadings, client assessments, court filings, client instructions or even company letterhead, most firms generate and retain an enormous amount of documents and data. Generally speaking products like Microsoft Office provide the tools to produce letters, spreadsheets and even presentations. Microsoft Word has become the international standard for electronic document editing, and the .doc file format is nearly universal. There are even free options such as Open Office, that support the .doc format and which provide almost all of the capabilities that your firm will need for day to day creation of documents. Regardless of which productivity suite you choose for your firm, there are a few important considerations.

1. **Client confidentiality and metadata** – Many practioners are completely unaware that there is a great deal of hidden information in a Microsoft Word document, and without realizing it, you may inadvertently breach confidentiality. It is common practice to re-use forms, templates, and drafts that have already been developed, fill out the specifics for particular clients' needs and send it out. Unfortunately MSWord documents store hidden *metadata*, which can contain references to information pertaining to other individuals or clients. It can also include deleted text, modified text, redline text and other information you wouldn't want anyone outside the firm to see. By sending a MSWord document that has hidden metadata, you may inadvertently provide confidential information to a third party, or expose internal communication to a client. It is extremely important to develop the procedures and tools to ensure this does not happen. One of the simplest ways to ensure that no hidden data is sent is to avoid sending word documents at all. Adobe Acrobat creates a secure 'print' of a MSWord document that excludes anything but the visible data in the .pdf format. While Acrobat is not a text editor, it is nearly as ubiquitous as MSWord, and, its format can be accessed by a free viewer, which is already present on most computers. You can use word to draft your documents and edit them in house, but for final release, use Adobe acrobat to 'lock' it in place. Adobe Acrobat can be costly, but there are other less expensive PDF generating programs available that can be used in the same way if you do not require the advanced features that Acrobat provides.

   There are also procedural steps you can take to protect confidentiality.

   a. Make it company policy to always start a document fresh;only use clean templates with no hidden data, instead or re-using a populated document.

   b. Do not use the version feature or the fast-save features in MSWord, since these features write directly into hidden data and create a historical record of any changes, whether the changes are part of the finished document or not.

   c. There is also a <u>'Remove Hidden Data Tool'</u> available for download from Microsoft, and it is a good idea to make it standard policy that this tool be run on any Word documents upon final completion and before transmittal to any outside party as a safeguard.

2.Standardization of work product – With hidden metadata addressed by tools and procedures, you should develop a comprehensive and organized repository for standardized firm forms, templates, samples and drafts. This common shared directory will become an invaluable resource for your firm allowing everyone to save time while also providing a firm standard work product. Spend the time to carefully plan this structure and make sure it is designed to accommodate future growth and changing needs. Make sure that any "form" documents are fully vetted and that they are periodically and regularly reviewed to ensure compliance with changing laws and regulations. It is also advisable to make the documents 'read-only' with only a select few able to directly change, modify or delete them. This will help ensure the integrity of your document library.

3. Data retention – Once documents have been created for a client or a particular case, they must

be retained for future reference and for legal retention requirements. It is very important to develop and enforce a standardized system of storing these documents on your file server where they can be easily accessed and backed up. Usually a hierarchal file structure works best and its exact form will vary from firm to firm. Whatever form it takes, it should be easy for everyone to understand, easy to search through and regularly audited for compliance. If possible, it should be mirrored with your physical, hard-copy filing structure and use the same organizational logic. Having staff saving files chaotically all over the network not only creates an administrative headache for your technology team, it also costs the firm in lost productivity while people are looking for files, exposure to files being forgotten in system migrations and information loss due to staff turnover. Establishing and maintaining a consistent and cohesive electronic document filing system is invaluable to a well-run practice. Taking the time to properly plan and implement your document directory structures now will save you an immense amount of time and trouble in the future.

Effectively managing these areas of concern will allow your practice to maximize the productivity and performance enhancements that document software has brought to today's business world. You will be able to make even your most commonplace software work for you and function as part of your overall technology plan to increase your firm's efficiency and quality. Ignoring these issues will negate any benefits and make even the most commonplace software a drain on resources. In the worst case, not addressing these issues could potentially expose the firm to a threat of malpractice.

## CASE MANAGEMENT AND TRACKING

Manually keeping track of dozens, hundreds or even thousands of cases being worked on by multiple attorneys, and legal assistants can be quite a challenge. Add the complexity and frequent changes in immigration law, regulation and procedure, and the need to track billable time, filing fees, filing deadlines, and all the various other aspects of managing large case loads, and it can begin to look overwhelming. However there are a number of good database software packages available to help with this task, and even some specifically designed for the immigration law field, such as Immigration Tracker, INSZoom, LawLogix, and ICS Immigrant to name a few. Broadly speaking they fall into two categories: Server based and hosted services.

### Software Installed on Your In-House Servers

With server based software, the program is installed locally on your own equipment, and is accessible directly within your network. Typically this involves a dedicated database server (usually SQL) that will house the database of client records and historic client activities such as e-mail communications, pleadings and filings, as well as scheduled activities and task reminders. You have complete control of the software, data, and access to it. This is the most familiar scenario to most computer users, and has distinct advantages because you retain sole administrative control of your core business assets. Typically, you pay for the software once with an optional maintenance agreement, and you can upgrade when you choose, sometimes do your own customizations, and directly link to other in-house systems. In short, it is your software, on your systems, under your control, and you can generally do what you want with it. The disadvantages are that you have to allocate resources to the proper administration and maintenance of the internal systems, and you have to build remote access capabilities if you want users to access the system from outside of the office.

### Software Hosted outside your Firewall by a Vendor

Though they offer the same or similar features to server based systems, hosted services are different, in that you store, communicate and track all of your core business data remotely via the Internet to a location where someone else handles the administration and maintenance of the system. All of your business data is stored on secure systems somewhere else, and all that is required is Internet access. Fees are usually a perpetual monthly per-user charge and rates may change over time. The main advantage of this model is that it completely frees you from administrative costs associated with maintaining an in-house server, and since it is entirely web-based, it can be accessed anytime, anywhere. The main disadvantage is that all the most crucial business data you have is under the direct control of a 3rd party, and that your have no ability to directly customize or integrate internal systems. One other distinct disadvantage is that if the office loses Internet connectivity, hosted services program are unavailable whereas in-house server based programs would continue to be accessible.

**Universal Considerations for Choosing a Case Tracking Software**

Regardless of the mode of software that suits you best, some sort of case tracking software is a necessity for any firm with multiple attorneys. Many of the rules for hardware discussed above apply here as well. When assessing the choices, speak to others in your industry about what they use and whether it suits them. If possible, get a trial version that you can test yourself. Check references and look for live demos with actual users. While it is possible to change case tracking software down the road, it will most likely be a disruptive, time and focus consuming process, so choose carefully on the front end. You should also carefully consider the areas of concern that are unique to law firms such as:

1. **Client Confidentiality** – On a server based system client confidentiality becomes a concern beyond overall network security if you choose to use any of the tools available in many packages to provide clients access to fill out forms on-line, review case status, or in any way directly access their information from outside your network. There are strong competitive advantages in terms of client confidence, responsiveness and efficiency. You can save a lot of time in gathering information and reporting progress if clients are able to submit information themselves via the Internet and run their own reports. While these features can be a real boon to your practice, particular care must be taken to ensure that confidentiality is not breached. Technologies such as SSL, Digital Certificates and encryption are generally advised, and should be incorporated into your technology plan. On a hosted services system, the security is entirely controlled by the software provider, and you have no direct control over it. Hosted services security is generally well within accepted industry "best practices" standards, and is not a direct concern. However, you should become familiar with the law regarding what happens if the hosting service allows confidentiality to be breached and what your liability is for their failure, as well as how rules of discovery and client attorney privilege are affected when the firm's data is housed on a third-party network. This is an area in which case law is still emerging, so be sure to be up to date when making your decisions. Also, remember that regardless of every other confidentiality issue, maintaining and protecting user passwords is a critical concern. Always use 'strong' passwords of 6-8 characters, upper and lower case letters, numbers and at least one non-standard character if possible. It is also very important to implement company policies that all passwords be changed at least every 45-90 days.

2. **Standardization of work product** – Case tracking and management software, particularly for immigration practices, provides an excellent mechanism for assisting in the standardization and quality control of both your business processes and the quality work your firm produces. The better programs also provide you with a way to customize the work flows and processes to create your own unique systems that match the unique way in which your firm handles cases. It is important to fully train every member of your staff involved in handling cases to make full

and complete use of these systems. From scheduling filing deadlines, to the proper form to use, to ensuring filing compliance, case management software is a valuable tool to ensure that your practice delivers reliable and consistently complete work to its clients. Another key advantage that most immigration case management software provide is forms subscriptions. There are hundreds of forms required by the Federal government for various immigration applications, and these forms are changed and updated on short notice and on a relatively random basis, making the task of consistently having the current forms available and ensuring that the correct form is being used a daunting one. Immigration software takes care of this burden for you, and ensures that you are always using the latest and correct Federal forms. Additionally, these packages often allow you to easily fill out a complete form based on information already gathered and entered into your case management database . Remember that while these are very useful tools to aid in your practice, you should never blindly trust in pre-fabricated processes and forms. It is always a lawyer's responsibility to verify and confirm that you and your firm are practicing competently on behalf of your clients. Each case is different and unique, and the specifics of any given case may not be fully covered by off-the-shelf templates and default processes. Automated software no matter how sophisticated, remains a tool that does not replace qualified and competent legal counsel.

3. <u>Data retention</u> – Case management and tracking software will incorporate a large amount of data ranging from contact information, to e-mail (or even voicemail) correspondence, to identification documents, to filing forms and any other type of record that can constitute a 'case file'. As a result, there is a great deal of information that must be retained both for in-house purposes and mandated retention policies. Your case management software database is no different, and as such you, should incorporate the database into you overall file retention policy. It is also highly recommended that wherever possible, your documents generated from the case management software be organized and filed following the exact same structure and rules as your paper documents as described above and preferably in the same physical location. This is very easily accomplished with a server based solution, but a hosted solution obviously means that your database documents online and your local network documents will be separate.

These areas of concern should be addressed before, during and after the selection and implementation of a case management and tracking software. Careful planning is essential to proper implementation. In many cases these are continuing and ongoing issues that will require you to implement specific policies for periodic review and confirmation that all systems are full, complete and being adhered to. It is especially true for case management software that "garbage in is garbage out". If you or your staff regularly enter information into the database incompletely, incorrectly, or inconsistently, then the results of your case management will likely be very incomplete, incorrect and inconsistent. Case management software is certainly not a "set it and forget it" tool. Much like the immigration field itself, it is constantly changing and requires a significant additional investment in ongoing training and quality control. However, if you adhere to diligent, detailed and consistent procedures, make sure that both new and old staff members are fully trained, and put policies in place to review compliance and consistency, it will become an invaluable tool for your practice.

## The Bottom Line on Building a Solid Technology Foundation.

The quality and caliber of the attorneys and legal staff at a firm are the chief differentiator between a mediocre practice and a top-tier practice. No amount of technology, processing power, software, or any other tool or device will make a bad attorney practice into a thriving success. But even the most competent and capable attorneys need the tools and technologies that allow them to focus on being the best attorneys possible by relying on a rock-solid foundation of tools and resources that accelerate and enhance their inherent capabilities. Too often, law firms view their technology as an unavoidable burden and a drain on firm resources, because a consistent lack of vision, planning and management has left them with a seriously cracked foundation.

You can avoid these pitfalls and gain a competitive advantage by wisely re-orienting your strategic thinking and planning to integrate your technology into your overall firm business plan. By identifying and setting long-term and short term goals and specific objectives, and carefully budgeting resources to achieve those goals, you can quickly transform your technology infrastructure into a stable platform from which to build. The right combination of technology team members, hardware, software, policies and procedures will propel your law firm forward into growth, success and through increased efficiencies-greater profitability.