

## 5. TECHNOLOGY ROADMAP

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Based on our discussions, we have identified the issues below as being particularly important to the business success of XXXXXX:

1. *The firm is spending money on software licenses it does not need*
2. *Attorneys cannot make phone calls while working remotely and incoming calls cannot be routed to them efficiently*
3. *The firm is losing money because clients are missing appointments or do not have required documents the need for an appointment*
4. *Attorneys and staff cannot safely keep track of passwords*
5. *New clients and matters need to be added to systems manually and time is often wasted because information is incomplete*
6. *Firm leadership does not have the time to manage IT and would rather be billing clients*

These issues are listed in order of importance.

Each section below discusses the business issue, the technology to be considered, and an approximate price in more detail.

### 1. The firm is spending money on software licenses it does not need

**Details**—The firm has been purchasing computers and laptops from Dell directly and paying for Microsoft 365 individually with each purchase. This creates issues managing licensing and making sure that licenses are unassigned to users when they leave the firm and new licenses assigned when someone joins.

The client is wasting money each year because they have purchased too many Microsoft 365 licenses in addition to retail Microsoft Office licenses.

**Solution**—Transfer all Microsoft 365 licenses to a Microsoft Cloud Services Provider (CSP). TransformITy works with multiple CSPs so that we can always make sure each client gets the best pricing and service. Once licenses are moved to a CSP, we help you manage that relationship to make sure you never pay more than you need to.

**Estimated Cost**—Annual savings of around \$8,000.

## 2. Attorneys cannot make phone calls while working remotely and incoming calls cannot be routed to them efficiently

**Details**— When COVID-19 forced the closure of the firm’s offices it was very difficult to manage phone calls. There was no way to route incoming calls to a receptionist at home, no way to transfer calls, and no way to call out from the firm’s phone numbers.

As a result, employees were forced to use their personal cell phone numbers for outgoing calls and incoming callers had to leave voicemail messages, which would then be returned from cell phones.

**Solution**—Implement unified communications to provide anytime, anywhere access for phone calls and video conferences.

This will involve selecting and implementing a complete unified communications solution that will include both desk phones in the office and softphone software to run on users’ cell phones.

Incoming calls can be routed to a receptionist working from home and then transferred seamlessly to the recipient.

In addition to phone service, the solution will include video and web conferencing and the ability to switch easily from a phone call to a video call.

**Estimated Cost**— Depending on the vendor, a full solution including phone service, web conferencing, and even a desk phone can be as low as \$36 per-user per-month.

## 3. The firm is losing money because clients are missing appointments or do not have required documents the need for an appointment

**Details**—Going around and around with clients to setup appointments is taking up too much attorney time. Once made, clients are missing appointments or coming without the documents they need. This is causing the firm to lose revenue.

**Solution**—Configure an appointment management system that allows the firm to setup dedicated appointment types and send links to clients for scheduling appointments.

The solution will also include custom integrations that will automatically text the client before the appointment and ask them to respond Y or N. If they respond that they will not be able to make the appoint, an alert will be sent to the attorney.

As a future enhancement, the firm is considering having some clients pay a deposit electronically when making their appointment.

**Estimated Cost**—Depending on the complexity of the process, calendar automation can be setup for as little as \$10/month for each attorney.

#### 4. Attorneys and staff cannot safely keep track of passwords

**Details**—Highly confidential passwords are being kept all over the place. They have been found on post-it notes under keyboards and on random slips of paper in desk drawers.

The firm must keep track of hundreds of passwords and keep them secure. Some are common to the firm (e.g. bank accounts), while others are different for each attorney (e.g. Lexis-Nexis).

Right now, there is no central place to keep firm passwords and each attorney is on her own for password management.

**Solution**—Deploy a password management system that can store all common passwords securely and restrict access based on a need to know. In addition to the firm vault, each user will have a dedicated vault for their own passwords. Each vault will be protected using two-factor authentication to ensure the security of the firm's passwords.

**Estimated Cost**—Password management will cost approximately \$4 per-user per-month.

#### 5. New clients and matters need to be added to systems manually and time is often wasted because information is incomplete

**Details**—It is time consuming and difficult to bring new clients and matters into the firm. Getting the information needed from the client is cumbersome and usually requires multiple phone calls or emails.

Once the firm has the information, it is difficult to get the data into the right places and to the right people. This wastes time and costs the firm money.

**Solution**—Use a forms automation application to collect the required information from the client by sending them a link to a form they can complete online. Once the client has filled out the form, it will be routed to the correct people at the firm for review and approval. After approval, data can be added automatically into the firm's systems.

**Estimated Cost**—Process automation costs can vary depending on the complexity of the process. Most of the time, the forms application costs between \$30 and \$100 per-month.

Adding things like digital signatures and payment options so that clients can pay a deposit electronically can increase this cost but also pay for themselves.

## 6. Firm leadership does not have the time to manage IT and would rather be billing clients

**Details**—It is difficult for the firm to keep abreast of everything that is happening in legal technology. Too often they are using technology defensively and not strategically.

Beyond planning, the firm needs help managing technology and making sure that it is budgeting the right amount each year.

**Solution**— Sign up for a fractional CIO subscription. For a reasonable fixed price, the firm can get all the help it needs.

A fractional CIO subscription provides a dedicated block of hours at a reduced rate. These hours can be used for help with IT planning, budgeting, or to implement technology projects that move the firm forward and drive revenue.

The subscription also provides for priority service in case of an emergency and a reduced hourly rate for work on projects.

**Estimated Cost**— Fractional CIO subscriptions can cost as little as \$1,000 per-month.