5. TECHNOLOGY ROADMAP

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

1. *It is difficult and expensive to manage on-site servers and user support issues*
2. *Lawyers have no way of sharing contacts and managing their business relationships*
3. *Users waste time trying to find client documents and still need to use the paper file*
4. *Lawyers lose money because they cannot bill clients for certain repetitive processes*
5. *The firm is worried it may get hacked*
6. *Firm administrators spend time managing IT issues when they could be focusing on their own departments*

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. It is difficult and expensive to manage on-site servers and user support issues

Details—The firm has no dedicated IT staff to maintain the three servers it runs on-site. It is difficult and expensive to hire people to maintain the servers and keeping them in the office renders them insecure and subject to power outages.

Recently, when a server went down on the weekend, attorneys were unable to bill until the middle of the day on Monday when the server finally got fixed.

In addition, as the firm grows, its users have more and more support needs. They have no one to call who knows their environment and can help them. The firm needs support for its infrastructure and users 24X7X365.

Solution— Move the servers to the cloud and contract with a managed service provider (MSP) for 24X7X365 server maintenance and user support.

The first step in this process is to formulate a plan to move the servers to the cloud using Amazon's six "Rs" and Microsoft's Cloud Adoption Framework. Adequate planning ahead of time will ensure that the migration goes smoothly.

Once the plan is in place, TransformITy can help choose the best MSP and then manage the entire conversion as well as the ongoing relationship. TransformITy works with multiple MSPs so that we can always make sure each client gets the best pricing and service.

Going forward, the MSP will provide ongoing maintenance for both the servers in the cloud and the company's computers, printers, and network as well as helpdesk services.

Estimated Cost—Managed services vary according to the number of servers and users under contract and the length of the contract.

2. Lawyers have no way of sharing contacts and managing their relationships

Details—Each attorney maintains his or her contacts in Microsoft Outlook. There is no central repository for the company's contacts and, therefore, no way to manage them or use them to drive new business.

The firm needs a central repository for contacts. The system should also automatically synchronize contacts with Outlook, provide attorneys with an easy way to set alerts to remind them to keep in touch with their contacts, and give the firm the ability to market to subsets of contacts.

Solution—Implement a cloud-based client relationship management (CRM) system to manage contacts and build a sales strategy.

There are many cloud CRM systems—all with their own strengths and weaknesses. Some have a strong focus on contact management, while others focus on building and managing a sales pipeline.

The first step, therefore, is picking the right vendor by bringing together users and understanding exactly what the business goals are for CRM. Once that is done, the system can be implemented and users trained in best practices for managing it.

Estimated Cost—CRM pricing generally starts at around $20 per-user per-month.

3. Users waste time trying to find client documents and still need to use the paper file

Details—The firm has been storing client documents in folders on an on-site Windows server. It wants to eliminate the management burdens of the server and find a better way to store and manage documents.

Solution—Deploy a best of breed document management system. There are a few systems designed specifically for managing documents in law firms. These used to be available only to

large firms willing to make a commitment to buying and managing an infrastructure of servers and databases. Now, however, they are available in the cloud and firms can license them on a per-user basis.

Installation of these cloud solutions is easy, but a successful implementation requires planning and knowledge of best practices. The firm needs a partner who knows both the technology and law firm document processes.

Estimated Cost—The cost of a document management system is highly dependent on the choice of system and the number of users.

4. Lawyers lose money because they cannot bill clients for certain repetitive processes

Details—There are things the firm does for its clients for which it cannot bill. These end up costing the firm money. In addition, clients are increasingly pressuring the firm to be more efficient in its work.

To address these issues, the firm wants to re-design and automate some of their critical business processes.

Solution—The first step in addressing this issue is bringing people at the firm together to define exactly what should be automated. The processes should be mapped using input from all relevant stakeholders in the firm.

Once each process is mapped, a cloud process automation application can be configured with forms and workflows. These applications provide all the tools necessary to automate business processes, including rule-based routing and a dashboard showing each user the items they have in process.

Estimated Cost—Automated workflow systems can cost between $400 and $800 per-month for the entire firm to use.

5. The firm is worried it may get hacked

Details—The firm is not convinced it is doing everything it can to keep client data secure and comply with data privacy regulations like CMR-17 and GDPR.

Solution—Perform a security audit and security training

Estimated Cost—Depending on the amount of time spent, an audit can cost as little as $5,000.

6. Firm administrators spend time managing IT issues when they could be focusing on their own departments

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.