

5. TECHNOLOGY ROADMAP

Based on our discussions, we have identified the technology tasks below as being particularly important to the business success of XXXXXX as they are starting operations:

1. *Domain name registration*
2. *Microsoft 365 account choice and setup*
3. *Telephone, web conferencing, and enterprise chat selection and setup*
4. *Setting up a website*
5. *Install and configure a complete practice management solution*
6. *Continuously improve the firm's technology*

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

1. Domain name registration

The firm needs to register one or more domain names. TransformITy will help the firm select a domain name, register the name, and configure it to be used for email using Microsoft 365.

Estimated Cost—Domain names are usually inexpensive at around \$20/year.

2. Microsoft 365 account choice and setup

All the firm's users will require a Microsoft 365 account. This will provide them with Microsoft Office productivity applications (Word, Excel, etc.) as well as email through Microsoft Exchange Online. There are several different Microsoft 365 plans, and TransformITy will help the firm decide which one best suits them.

It is important to get Microsoft 365 setup properly from the beginning because some elements of the setup cannot be changed down the road. TransformITy will setup the firm's account in Microsoft 365 and provision users for the firm. We will then help users install and configure the applications on their computers and phones.

Estimated Cost—Microsoft 365 licensing is usually \$12.50 per-month per-user.

3. Telephone, web conferencing, and enterprise chat selection and setup

The firm requires a unified communications provider so that all users have telephone numbers, telephones (if necessary), web conferencing, and the ability to chat with others in the firm. There are a number of options available for unified communications. Three examples are Microsoft Teams, Zoom, and Ring Central. TransformITy will help the firm decide which solution is best and then handle licensing and configuration.

We will then establish accounts for each user and work with the users to add the software to their phones and computers. If desk phones are required, we will set those up as well. TransformITy will also train all users in the use the system and assist the firm with developing best practices.

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.

4. Setting up a website

A website is one of the most important first steps for a new firm. Firm websites can range from the very simple to the extremely complex. In many cases, a basic site that can be edited easily and expanded moderately is the best solution. In other cases, it is best to start with a placeholder site and then develop a more sophisticated site afterwards. Some firms will even opt to develop a sophisticated site from the beginning.

TransformITy can work with the firm to design and build a basic website that will include all the important information about the firm and its lawyers. The site can also include forms for potential clients to complete top get more information. If the firm outgrows this site, TransformITy can assist the attorneys with finding a professional web designer.

Estimated Cost—Hosting for a basic website is under \$20 per-month.

5. Install and configure a complete practice management solution

The firm wants to make the best use of technology from the very beginning and is starting from a blank slate. A practice management tool like Clio is licensed on a per-user basis and can grow with the firm.

Clio's basic building block is called Clio Manage. It includes case management, contact management, legal document management and calendaring. It also includes accounting and billing modules.

One of the greatest advantages of going with a complete practice management system is that all the firm's data will be integrated from the very beginning. Contacts will be linked to clients, documents will be linked to matters, and invoices will be linked to clients. This level of integration is very difficult, if not impossible, to achieve outside of an integrated solution.

Another key advantage is that Clio can grow with the firm. As the firm grows, it can easily add licenses for new users. When the time is right, the firm can even add on the Clio Grow module, which includes automated intake, scheduling, workflow automation, and CRM.

By starting with Clio, the firm will put itself in the best position going forward.

Estimated Cost—Clio manage starts at only \$39 per-user per-month, with plans running up to \$115 per-user per-month.

6. Continuously improve the firm's technology

As a new firm, it is critically important that attorneys devote as much time to billing and business development as possible. By signing up for a fractional CIO subscription, the firm ensures that it will always have a seasoned legal IT expert available to them. A fractional CIO subscription provides a dedicated block of hours at a reduced rate. It also provides for priority service in case of an emergency and a reduced hourly rate for work on projects.

As the firm moves forward, a fractional CIO will always be there to provide information on what other firms are doing, help with IT procurement, and to work with firm leaders to define technology priorities and plan technology initiatives.

Then, the fractional CIO will be there to help make those plans a reality, whether the project is expanding the use of Clio, building automated workflows to save time and money, configuring the firm to receive electronic signatures and payments, or training new attorneys.

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