

New Law Firm Quick Start Technology Guide

1. Office Suite: [Office 365](#) or [Google Office Suite](#)

These services allow you to perform basic business management functions and administrative task. Both offer calendaring, email, document management and video conferencing. Both providers offer other services such as domain name, website hosting, and website building for an additional cost. Choosing between two most often comes down to preference. One major distinction is that Office 365 offers more flexibility for transitioning between on-line and off-line work. [Click here](#) for a product comparison.

2. Document Management: [OneDrive](#) or [Google Drive](#)

You need the ability to securely share documents and a place to back up and store electronic files. Ideally you want them to be accessible from anywhere you can get an internet connection. These services are included with or can be added to the [Office 365](#) suite or [GSuite](#) respectively. Storage space can be increased based upon your plan. Be sure to purchase enough space to hold all your files electronically. Typically, 1 terabyte is more than enough.

3. Case Management: [Clio](#) or [MyCase](#)

Case management programs will help you manage your cases and client files by maintaining client records in one centralized location. Both programs will also allow you to take payments, track client funds, manage the IOLTA's, generate invoices, and access files remotely.

4. Answering Service/Virtual Assistant: [Call Ruby](#) or [Smith.ai](#)

Using virtual assistance allows you to outsource administrative task allowing you to increase productivity and profitability. Virtual assistance can provide services that would normally be performed by a costly a full-time administrative staff. These services can offer phone answering, appointment setting, intake services and more. These services are ideal for a new law firm when overhead should be kept to a minimum.

5. Website: [Wix](#) or [Weebly](#)

A low cost, polished, and professional website serves as your on-line business card. If you want to build your own website, [Wix](#) and [Weebly](#) provide building platforms that allow for easy drag and drop features to make website building easy for the less tech savvy.

6. Domain Name: [GoDaddy](#) or [Domain.com](#)

You will need a domain name because this is where your website will “live” on the internet. Ideally you should purchase a domain name that is the same as your law firm name. Office 365 and Google will provide a domain name for an additional cost. [Wix](#) and [Weebly](#) also offer this service. www.GoDaddy.com and [Domain.com](#) specialize in providing domain names and offer website building. Domain name and website providers offer multiple services that overlap. Tip: Stick with the same service provider for multiple products whenever feasible.

This is not an all-inclusive list of software programs you may need to operate your law firm. Others include time and billing software, payment processors, form builders, project management, workflow managers and more. For more information on the selecting tools for your law firm contact the D.C. Bar Practice Management Advisory Service at pmas@dcbbar.org.