

# The Mobile Revolution:

What Law Firms Need to Know

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## A new standard for professional service

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Since the beginning of the legal industry, a lawyer's greatest asset continues to be an in-depth knowledge of the law and the contexts in which it applies. Being a good lawyer means being able to earn the best possible outcomes for your clients. Being a successful lawyer, however, is about doing this with efficiency and at scale.

Technology makes us more efficient in getting clients the services they need. Mobile devices have become nearly ubiquitous in our society, and consumers have come to expect on-demand attention and seamless experiences across all industries—including professional services—which has set a new standard for the rhythm and pace of client interaction.

For law firms, the shift to using mobile technologies brings many opportunities as well as challenges. Being mobile helps lawyers get more done in a day and improves responsiveness to clients. But with the ever-increasing number of app options available (128,000 business apps were added to the iOS App Store in 2014 alone<sup>1</sup>), the possibilities can be overwhelming. It's important to have a consolidated strategy for your legal workflow—to ensure compliance with rules for ethical conduct, and to keep you from having to balance too many apps that compete for your time.

In the following pages, we'll look at how mobile technologies have opened new doors for legal practices, and how lawyers can get the most out of what's available.

## What's changed?

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Chances are, you're already using a mobile device throughout any given day.

According to Mary Meeker's *2015 Internet Trends* report, time spent consuming digital media more than doubled over the course of seven years—from 2.7 hours per day in 2008 to 5.6 hours in 2015. **What's most significant is that this jump occurred almost entirely on mobile devices, increasing from 0.3 hours in 2008 to 2.8 hours in 2015.** Now, more than half of all digital media is accessed through a mobile device.<sup>2</sup>

Smartphones have replaced many of our household items—alarm clocks, watches, maps, cameras, flashlights, music players, and more. Studies as far back as 2007 show that 91 percent of adults rarely keep their phones beyond arm's reach<sup>3</sup>—and this was before most people had phones that were “smart.” We use mobile devices for shopping, ordering food, and planning and booking vacations. Around the world, 69 percent of people rely on mobile banking services—and in many cases, online payment systems circumvent banking systems entirely.<sup>4</sup>

Mobile technology has also changed how we work. A recent Softchoice study looked at the work habits of full-time office employees in North America. It found that 78 percent of workers value being able to remotely access their work, and 86 percent value having flexible hours. In fact, workers value flexibility so much that 70 percent of them would leave their job for more of it.<sup>5</sup>

Lawyers are no different, and mobility has always been essential to the practice of law. Depending on jurisdiction and area of practice, lawyers spend much of their time out of office—and not just to appear in court. Consider this: According to the *ABA 2015 Tech Report*, about 75 percent of survey respondents reported [working out of office](#)—including from home (88 percent), hotels (40 percent), other offices (23 percent), vacation homes (18 percent), public places (16 percent), and coffee shops or cafes (10 percent).<sup>6</sup>

### Mobile security for ethical legal practice

There are two primary concerns when handling firm data with a mobile device: (1) maintaining timely communications with clients; and, (2) maintaining confidentiality of all client information.

Loss, theft, or damage of a mobile device can compromise a lawyer's ability to communicate effectively with clients. That's why it's important to have a backup plan for accessing firm data. Another threat to a lawyer's professional conduct is the inadvertent or unauthorized access of firm data. It's important that lawyers know the risks associated with mobile devices and how to effectively manage them.

Basic precautions may include common sense habits such as not speaking about sensitive client information in public spaces and avoiding workspaces where people can observe your screen activity. Other key precautions include:

- ⚙️ [Encrypting your mobile device](#)
- ⚙️ [Enabling a remote data wipe option](#)
- ⚙️ [Communicating through secure channels when using public Wi-Fi \(via a secure app or https-secured sites\)](#)
- ⚙️ [Using secure settings across all apps, including strong passwords, two-factor authentication, and session logging](#)
- ⚙️ [Updating your apps frequently](#)
- ⚙️ [Implementing a bring your own device \(BYOD\) policy to ensure all members of your firm adhere to proper data protocols when working out of the office](#)
- ⚙️ [Making frequent backups of all firm data](#)

For a more in-depth discussion of mobile security for lawyers, watch [The Shift to Mobile Legal Services](#) webinar.

## Balance your personal life with work

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Traditionally, balancing the personal and professional aspects of life has been about creating separation. Now, it's becoming more about integration. The advantage of a seamless practice management system, accessible across all your firm's mobile and desktop devices, is that you can literally work from anywhere. You can be in more than one place at one time—to get more done, and to get people what they need when they need it.

This can be both a blessing and a curse.

One way to think about it is that you could be working all the time, no matter where you are. Another way is to look at all the work you can get done throughout the day—so that you can find time for more leisurely pursuits. This is the benefit of being able to work remotely on your own time. In fact, 75 percent of employees surveyed by Softchoice say they can keep more personal and social commitments when they have greater flexibility with respect to how they work. And, 61 percent of workers prefer to break up an eight-hour day over the course of a longer workday.

Black holes in your daily productivity can be turned into routine opportunities for key tasks. With comprehensive access to all of your resources, you can turn downtime—things like daily transit rides or trips to the dentist's office—into newfound productivity. Having the right tools means you can do the things you want to do outside the office without neglecting clients. You can attend your kid's soccer practice and make it to more family dinners. Rather than forego vacation time, you can leave town while maintaining full access to all your firm's information. A regular change of scenery might be something you want to consider—where a favorite vacation spot could double as a second office.



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## Manage firm documents and information

Manage your matters with comprehensive access to all documents and contact information. When you store case files in the cloud, you get instant accessibility to all your information from anywhere. Electronic documentation also allows you to assign custom fields for efficient sorting and recall—and mobile accessibility lets you do it from virtually any device.

Beyond access, mobile practice management software simply allows you to do more:

-  Attach new memos and documents directly to matters. Type short notes to yourself or scan paper documents using your smartphone or tablet's camera.
-  Save all email correspondences to their relevant matter by sending them to a unique Maildrop address.
-  Record audio with your favorite recording app, and then sync the files through a document storage app such as Dropbox.



## How to get the most out of your mobile device

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The question is, are lawyers taking advantage of the resources that will help them be successful? Given that only 41 percent of ABA survey respondents have downloaded a legal-specific app, and only 17 percent have an app for time tracking, there's likely much potential for improvement.

The right tools can help you get more done when away from the office. It's important to know what's available, and how to set yourself up with the most efficient workflow possible. This means taking advantage of a mobile practice management platform such as Clio, which offers a dedicated mobile app for seamless integration between office and on-the-go workflows.

**Communicate better across channels.** Phones were made to help us communicate, but they've evolved far beyond the traditional voice call. Smartphones allow you to communicate via text and email—and a host of social media platforms. The obvious insight here is that you can be on call from anywhere, meaning you'll never be beyond the reach of your clients.

What's less obvious is that not all standard communication channels are secure. Many can leave your transmitted messages unencrypted and visible for interception. Using a [secure client portal](#) allows you to communicate in a safer environment. Clio, for example, allows you to compose your messages within Clio's mobile app, which then notifies your client of the message. All that gets transmitted is the notification to log into the secure portal—your client communications remain encrypted and only accessible via login.

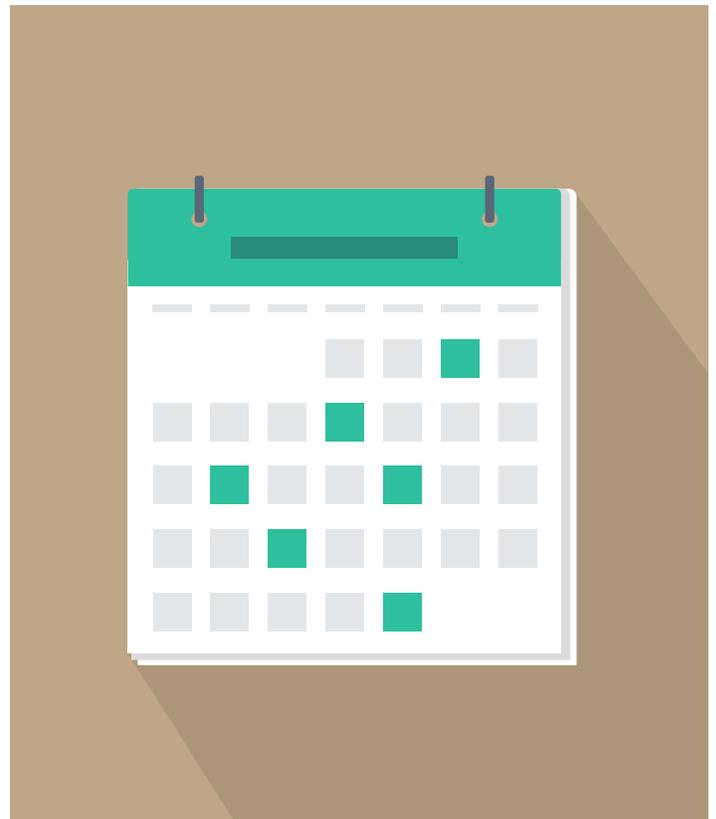
**Stay organized with all of your tasks and calendar information in one place.** Chances are you already use your mobile devices to keep track of your personal contacts and [calendar](#) items. If you haven't done it already, syncing your office resources to your phone is a good idea for staying on top of appointments and assignments.

An even better idea is to use dedicated software to keep your work and private life separate. While having everything you need in one place is necessary for creating flexible workflows, having a way to

distinguish work contacts and appointments helps avoid confusing your responsibilities—and helps you disconnect when you really need to. Working from an app like Clio also allows you to link all events and [tasks](#) directly to clients and matters for future reference and billing.

Also, being out of office doesn't need to mean being out of pocket. With Clio's mobile app, you can assign and track all firm activity by individual staff members, clients, or matters.

**Organize and track all of your firm data from one source.** When you store your data on a cloud server, you can access and share information from anywhere. Dropbox and Box are cloud storage services that many lawyers already use to store and share information, and Clio integrates with them to offer one seamless interface.



## How to get the most out of your mobile device (continued)

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Managing electronic documents from your practice management software allows you to link documents directly to specific clients or matters, and custom fields let you apply your own sorting conventions. Having your data in one place also makes it easier to integrate documents into your communications—attaching them to messages or linking them in your client portals.

**Write and edit documents.** Legal practice is a document-oriented profession. Without the ability to create and manipulate text into concise documentation, you're going to have a difficult time earning an honest dollar.

Two of the most widely used document-editing platforms—Microsoft Office 365 and Google's G Suite—offer mobile apps with comprehensive features. They are also cloud-based and integrate seamlessly with Clio, so that anything you write or edit will save automatically to your firm's database. Other apps offer extensive PDF editing capabilities that are ideal for red-lining documents (GoodReader and iAnnotate), preparing depositions (AgileLaw), and preparing trial presentations (TrialPad).

**Track all of your billable time.** The very nature of mobile technology is that it encourages more interaction at a more responsive rate. The result is that lawyers might find themselves juggling more tasks between clients and matters than they did a decade ago. When working out of office, where scraps of paper or notes in the corner of your legal pad can easily get lost, it's important to keep all of your time tracking in one place. Rather than carry a dedicated notebook, you can keep all of this information in your mobile device.

Clio also has the benefit of an [in-app timer](#). Start the timer whenever you start a new task—whether it's answering a phone call or researching a case—and then save the time entry to a specific client and matter. When you're ready to prepare an invoice, you'll have all of the information you need in one place for quick and seamless billing.

### Manage and track all firm operations

Whether you're working within a larger firm with access to support staff or running a solo practice, it's important that you know what needs to get done. Practice management software tracks all of your important meetings and tasks, helping you monitor and prioritize everything in one place.

-  Sync all of your firm calendars. Whether it's through your in-app calendar, or another third-party calendar service, you'll always have up-to-date information on where you need to be. At a glance, you can also see who's available, and when.
-  Assign Advanced Tasks to yourself or other members of your firm. Set parameters for task type, priority level, estimated time to complete, and progress indicators. You can then track tasks according to these parameters, as well as to specific matters and who they're assigned to. Advanced Tasks are available with [Clio's Elite subscription](#).

Both calendar events and time-sensitive tasks can send push notifications to your mobile device, ensuring nothing that's timely ever gets lost.

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## Value for lawyers = Value for clients

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Firms that adopt mobile technology can work faster, and ultimately, compete better for clients.

Technology gives us better access to people, places, and information. With a mobile phone, you're never more than a phone call, email, or text message away from a current or potential client. This can be especially pertinent to clients working jobs that are difficult to get away from during business hours. Being available outside of typical office hours will make you more competitive over other lawyers who aren't. Clients who get the timely attention they need are generally happier and more satisfied—and satisfied clients are more likely to pay you (often, pay you more) and refer your services.<sup>7</sup>

Modern consumers are savvier than before—they expect more. They're well-researched and able to access extensive information about whom they hire online. The modern consumer is, in many respects, in the driver's seat, and modern businesspersons must be reactive and responsive. According to Pew Research, 68 percent of Americans use smartphones. This number jumps to 86 percent for individuals between the ages of 18 and 29.<sup>8</sup> If your clients are connected via mobile during all waking hours, chances are they'll expect you to be connected too. If lawyers don't adapt to new modes of interaction, they run the risk of not existing at all.

### You could be losing \$50,000 per year

For a busy lawyer, nothing is more important than time. A recent study showed that professionals who don't log billable time concurrently to the work they do risk losing that time—especially if they try to recall their work activities several days after performing them. Email in particular often gets missed when tracking time, which can cause professionals to lose up to \$50,000 in revenue each year.<sup>9</sup>

Mobile practice management software features an in-app timer that allows you to track and log time simultaneously according to the work you do. When using an in-app timer, you can log time directly to specific matters with a record of tasks performed. You can even vary your rate according to practice areas, clients, and predetermined or custom tasks.

Having mobile access to your practice management system means you always have the ability to log time, no matter what you're doing. You can log time as you work, and have a record of everything you've done in one place when it comes time to do your invoicing. In fact, firms that track time simultaneously with the tasks they perform tend to generate 25 to 40 percent more income than firms that don't.<sup>10</sup>



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