

Technology in the Practice Committee
March 4, 2021
2021 Virtual Fall Meeting

MOVING YOUR FIRM SERVER TO THE CLOUD

I. Scope. This presentation follows the previous one at the Fall 2020 committee meeting – “NUTS AND BOLTS - Where Should Your Server Sleep at Night?” This presentation will cover assessment, choosing a provider, and implementation.

II. Assessment. The initial phase should involve a fresh look at the law firm, its real needs, future growth, ability of the “lead IT partner,” staff IT assistance, internal IT personnel, external IT vendors, attorney and staff compliance with IT policies, etc.

Cost fades as a factor since it basically ends up being a front end investment for a physical server versus a monthly cost for a cloud server (after migration expense). It becomes a “pay me now” versus “pay me later” issue.

Law firm size. Solos and very small firms have a “no server” option. Many programs and services that law firms need are becoming available through browser or app connections. Carefully assess what each attorney is actually using in a small firm. What is being shared or must be accessed by all? We determined that it was possible for us to do without a server of any kind.

The only program or software that we were using that we all had to access was TABs for billing. We would all need to have all other software on the computer of each attorney. And software as needed on our two staff computers. That would involve multiple licenses for software that was currently available on the physical server with one license but accessible by any one user at a time. That included Number Cruncher, GEMs, Retirement Plan Analyzer, etc. The problem to solve was TABs. Our current version was available to each user on our physical server, including PracticeMaster which we use only for client file maintenance. The solution for TABs and PracticeMaster would have been to load them on our billing staff computer. Then have the other staff person access it by a peer-to-peer connection. We would upgrade to the Platinum version of TABs. Then each attorney would have a browser or app connection to enter time. The practical limitation

would be that attorneys would not be able to access the full features of TABs or Practice Master – such as summary or detailed billing previews, etc. But the billing staff person generates pre-bills, etc. for those purposes. The advantage of this approach is lower cost than any cloud service. An important factor would be firm growth since this approach only works in a small setting. We ultimately decided for a regular cloud server. The minimal solution would have required more IT management by one of the partners and coordination with a local IT service provider.

At the 2020 Fall Meeting of the committee, there was a presentation by Abigail O'Connor, regarding Firm Central - [Firm Central | Thomson Reuters](#). This cloud server appears to be a good choice for a solo or very small firm that wishes to have everything in one place and all provided. That includes the normal software, including time keeping and billing functions. A consideration is that the system is not flexible nor can a user add much if anything to what is offered. And it is limited as to the total number of users. WestLaw is part of the package but other tax library materials from Thomson Reuters are not included.

IT management. A factor in choosing to move to a cloud server is how the law firm manages its IT needs – within the law firm and external for IT services. Internally it is often difficult to find a partner with enough IT expertise to be in charge of managing IT needs and resources. It is far enough removed from the practice of law as to be an undesirable task for many attorneys. And the responsibility is large in any firm. The task involves coordination with all external IT resources and persons and then informing the law firm management/partners with respect to needs and solutions. Every law firm and IT manager for the firm must be knowledgeable enough to communicate with the IT service providers. All obvious points but heightened when a firm is considering moving to a cloud solution where advice as to the best solution may have multiple conflicts among the IT service providers. A local IT service provider or an internal IT manager or staff may have a conflicting bias towards a physical server or at least local control of services from the cloud server provider. This issue is firm size sensitive also in that a large firm will need and utilize local or internal IT service personnel while a smaller firm may be better served by using a cloud server provider that covers all IT needs – cloud, local, and each computer/user.

III. Choosing a Cloud Service. The task of picking a winner among the cloud service providers is a daunting task. You can compare it to interviewing for an important staff position or new attorneys. Interviews and questions are necessary but as we all learn over time, the actual results of such decisions are not known until after a selection is made.

Software list. Before proceeding, compile a list of all software on all computers – including your physical server and all user computers. Note how many copies of each software are in use. Note any that are single use licenses that allow all users on a server to access them one at a time. This is a good time to make sure you have licenses for each software product. The cloud providers will not load, much less support, any unlicensed software. So if anyone has an old favorite that is no longer available or supported, it cannot be loaded onto the cloud server. This is a good time to review any software that is used by multiple users but with individual licenses. It may be less expensive to convert to a multi-use license when moving to the cloud.

Send the list to each cloud provider that you interview in advance. Ask them to identify any software that they do not support. And any that they have an alternate recommendation. Watch out for version differences. Some cloud services provide MS Office 2020 instead of MS Office 365, for example. There may not be any functional difference but now is the time to be aware and ask questions. One cloud provider recommended a less expensive alternative to Adobe Acrobat. Ask if your licenses will cover the firm upon onboarding. One provider recommended a similar product by one of our software companies that would have required new licenses with no refunds for the cancellation of our similar existing product that had almost a year left on our current licenses.

Inquire as to where anti-virus software provides protection. In our case, all but one provider installs and supports anti-virus software when in the cloud and when out of the cloud just running on your C drive. The other provider stated that we would be relying on MS Defender when not in the cloud.

Hardware list. Similarly, a compilation of all hardware should be made. Particularly of all hardware that will remain after removal of your physical server and any NAS backup devices. Start with your modem and move outward through your network. It will also be useful in interviews to ask

about recommended products by the cloud service providers. For example, we found our Watchguard firewalls were the preferred products by some providers that we interviewed. You should inquire if a provider will support your current devices until they are replaced in the normal course. You can then switch to their preferred products.

Be sure to understand for the level of service being quoted how far the cloud provider service extends. Some support only the cloud server and its applications. Others support all the way to each computer and each network component. And usually there are different service offerings to consider from each cloud provider. One we considered does not support the local network, requiring a local IT firm for that work.

The first decision tier is local versus national. Some local IT services firm will offer a cloud server solution. But not all. And local providers will vary as to expertise and experience. All will utilize Azure, AWS, Citrix and perhaps others to provide the actual cloud structure (the physical servers and devices that a user rents space on to run a dedicated cloud server or a virtual cloud server). The evaluation needs to focus on the ability of a local provider to service the needs. A local IT service provider has the advantage of being able to come to the law firm offices to install and maintain the connections from the internet modem through the law firm network out to the cloud server. All cloud server work is done via the internet obviously.

The national cloud server providers that we reviewed offered total IT services, or just the cloud services with the IT needs inside the law firm being provided locally or in house. Some national providers focus on law firms, or totally restrict their services to law firms. The advantage is a higher level of understanding of the needs of law firms. And the ability to solve software or other product issues more easily based on specific experience with the needs of law firms.

For each cloud provider, verify what support is provided in the monthly pricing. For example, are there any additional charges for new computers or printers or users? Any charges for major software upgrades in your product list? How often does your pricing change? What is the subscription length? How is your monthly pricing affected when you add a user, or drop a user?

Ask what each cloud provider promises in terms of service response times. How are service requests made? Most offer a help desk approach. Can your internal IT manager make direct contact to an assigned customer support person if needed?

Ask during each interview if the cloud service provider has ever had a breach of its data or that of any customer. Ask if any customer has ever lost data. Ask if the cloud provider can provide for certification for any compliance standards that your firm is subject to - HIPPA, ISO certifications, etc.

Some cloud providers will offer an encrypted download service to a NAS device in the law firm office. This is to comfort those that are somewhat paranoid about losing data. It is an add on cost but would protect against the unexpected. And your data would be available if the cloud provider went out of business overnight. Also, any reloading of all your data would be faster than using the internet or even a data drive shipped to you. The cloud providers promise such redundancy of backups that this should never be necessary.

Look exhaustively at all materials on each prospective cloud provider website before each interview. A good prospect will have extensive materials describing their offerings, including videos on selected subjects. While tedious, such research gives a good view of how the provider operations. And statements on the websites are better comfort than the salesperson assuring you that they take care of “everything.”

AirDesk Legal - <https://www.airdesklegal.com/>

8 years in business. Mostly law firms with some CPA firms as customers. In the process of moving from Citrix based platform to an Azure based platform. The Azure platform provides a smoother “look and feel” that can be important to your users. The cloud transition is different enough that you do not want to revert to a clunkier interface. Committee member Mike Deege is a long time user of AirDesk and an advocate for them.

Uptime Legal Systems - <https://www.uptimelegal.com/>

Cloud services only since 2007. 100% law firms as customers. All W2, full-time, US based staff. No term contracts – monthly only. Expansive

materials on its website explaining cloud servers and the services of Uptime. Sales consultant was able to handle all technical questions during the interview. In addition to the normal redundancy backups and multiple locations for your data, Uptime is installing an additional dedicated AW3 backup for its entire cloud platform and data. Cloud Cost Calculator on the Uptime website is a quick method to assess costs. [Cloud Cost Calculator for Law Firms \(uptimepractice.com\)](#) A good cost video is on the same page.

ProCirrus Cloud Technologies - <https://www.procirrus.com/>

In business since 1999. 99% legal market with 300 firms. Has some financial and medical related customers. All SSD drives. Citrix based interface. A preferred provider for TABs and PracticeMaster. Month to month terms – no long term subscriptions. All U.S. based employees. Offered all the usual services and products. Most expensive onboarding estimate.

IV. Implementation. The last step is called “onboarding.” That involves multiple steps to move everything safely and properly and everybody from your physical server to the cloud server. It is a six week or so process and is a front end expense in addition to your contracted monthly costs. The costs for onboarding vary among the cloud providers.

Caveat: Our experience is obviously based on our set of facts and experience. Your law firm investigation may need to consider other factors.

Your Journey to the Cloud

The Onboarding Process

1. Discovery & Assessment [1-2 Weeks]
2. Planning & Coordination [1-2 Weeks]
3. Build & Prep [2-3 Weeks]
4. Data Gathering [1-2 Days]
5. Cutover [1-2 Days]
6. Training & Support [Ongoing]

Timelines are average.

