

YOUR
FIRM NEEDS
A TECH
PHILOSOPHY

By Michael S. Finkelstein and Scott L. Sternberg

In October 2019, the American Bar Association's Young Lawyers Division came to New Orleans for its fall conference and CLE. As part of the weekend's programming, we gave a presentation on how we built our own "tech stack" for our young, tech-forward law firm. Our premise was simple: There are a number of all-in-one solutions for legal tech, but they didn't work for us, so we suggested building our own. To do that, you need a tech philosophy.

Three years ago, our new firm was born and set a few young attorneys (and one young-at-heart attorney) off on the adventure of a lifetime. With 12 attorneys now, we attribute our significant growth to the environment of the firm. One of the key things we did early on to build our environment is to define our "tech philosophy."

A tech philosophy is just like a billing philosophy or a firm philosophy: When you're in doubt, ask yourself whether your tech (or your billing or your work) meshes with your ideals.

Our firm's tech philosophy is elegant and simple: *We implement technology to help our lawyers be efficient, flexible and collaborative in a high-paced and fun practice.*

With this philosophy in mind, we have committed ourselves to finding the technology that fits our ambitions. Early on, we agreed that our firm would implement the most cutting-edge legal technologies available in order to run as efficiently as possible. This would help us be lean and, ultimately, keep costs down.

At the same time, we envisioned being paperless and having the flexibility to work from anywhere. On a personal level, this was especially important for our personal goals of t-ball games, fulfilling service, and those days when it's just too hard to get out of bed after a Saints game.

We quickly found that the highly marketed all-in-one law practice solutions weren't going to work for a boutique with our breadth and scope from

transactional to litigation. They were cumbersome to implement and required hours of inputting information. Scalability questions highlighted, for us, further concerns of price and capabilities. In other words, these systems didn't fit our philosophy.

Even if we were to implement an all-in-one platform, we still needed external platforms such as email and word processing suites. They didn't always play well together and were expensive and difficult to scale. Those systems work well for certain practices but none of them did all the things we wanted exceptionally well. So, instead, we built our own "stack" of technology tools.

Ultimately, we found Google's business tools, including email with an integrated calendar, and separate providers for our billing, accounting and e-fax (which we hope to no longer need one day) would serve as our foundational platform. We found a professional file management platform that integrated into our existing hardware to appear native on the hard drive and would even notify us if another user was in the same file. This proved incredibly helpful as we emphasize collaboration and often team up to draft documents.

At the core of our stack is a real-time communications system called Slack. There are many alternatives to Slack, but, for our firm, Slack is like a chat room, phone conference and email conversation in one. We create a Slack channel for every case and add the team members working on that controversy into that channel. There is a running dialogue about each case 24 hours a day, seven days a week. Our email traffic was cut in half almost instantly. Slack integrates with our task management and assignment software, too.

It fits perfectly with our tech philosophy, particularly the "high-paced" and "fun" part. We use cloud-based videoconferencing and billing software which allows us to operate from anywhere as if we were in the office — an important goal given our flexible "office" dreams. This has the added benefit of ensuring

the firm's operations are also hurricane-ready.

All of this is in furtherance of the tech philosophy of the firm.

Over the course of the past two years, our firm has been invited to beta-test certain platforms and we have swapped out some of our initial suites for others. While our implementation of tech has not always been perfect, we have kept open a healthy dialogue about the role each one serves in our practice and how to best serve our attorneys and staff. As our firm expanded to a Baton Rouge office, weathered hurricanes and survived floods and "freezing condition" shutdowns, these tools have cemented their roles in our firm's business model. Our clients like them, too. Because they save money!

We like the rhyme and rhythm to our tech stack. That is not to say it is never changing. The parts may be replaced, but our philosophy remains as our guiding post. As a part of that philosophy, we are committed to vetting new platforms and wouldn't hesitate to change out a piece when necessary. Every firm is different, and every firm's needs are different. But one thing is sure, in order to build your own "tech stack," you've got to know what your tech philosophy is and the goals you want to achieve.

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