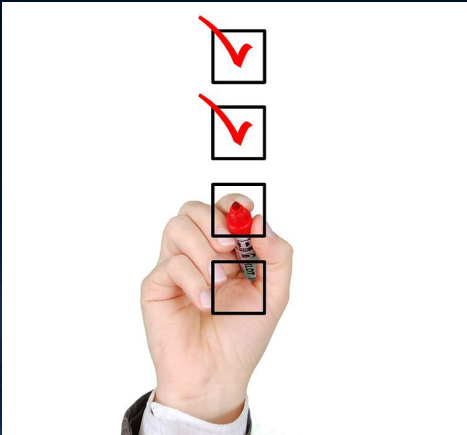


Software Automation

PRESENTED BY:
DLC CONSULTING SERVICES, LLC AND
LAW OFFICE MANAGEMENT
SEPTEMBER 21, 2023

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Agenda



- Software In The Marketplace
- Choosing Software
- Avoid Pitfalls
- Tips & Techniques
- Questions

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THE MARKPLACE

- What does Cloud Based Software mean?
 - SaaS
 - Co-Location
 - Azure / Google Servers
- Server Based
 - Pluses
 - Minuses
- Cloud Based
 - Pluses
 - Minuses



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THE BASICS




- Word Processing
- Email
- Document Storage
- Forms
- Research
- Time & Billing
- Finance

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CHOOSING SOFTWARE



- Versatile
- Mobile
- Secure
- Common
- Support

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SOFTWARE TO SAVE TIME



- Documents
[Macros/Templates/Automation]
- Time Entry
[Codes/Talking Your Time/Spell Check]
- Outlook Email
[Quick Parts/Templates]
- Word
[Read Aloud/Quick Access Toolbar]

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CHOOSING SOFTWARE

- Understand What You Need
- Make a Chart
- How to Demo
- On-Line Reviews/List Serves/References
- Demo Final Product [Again]
- Understand What "Set Up" Means



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Hacking Las Vegas

Ceasar's

- Social Engineering Attack
- Though an IT Support Co.
- \$15 Million in Ransom
- Don't know if stolen data was deleted.
- No Down Time

MGM

- Social Engineering Attack
- Through Help Desk
- No Ransom Paid
- Don't know what happened with stolen data.
- Had an infiltration on 9/7 – Hacked on 9/11, Down for 5 days.

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Social Engineering

- Manipulation exploiting human error to gain access.
- Gather background information on group or individual.
- Establish relationship or initiate an interaction – build trust.
- Find weakness.
- Attack.



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SECURITY WHEN CHOOSING SOFTWARE



WHO HANDLES WHAT
PIECE



KNOW WHERE THE
DATA IS STORED



WHAT SECURITY DOES
THE INFORMATION
HAVE IN TRANSIT



WHAT HAPPENS IN AN
AUDIT

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Pitfalls

- Not having Cyber Security
- Not checking security your clients require – If you work for banks, need SOC 2.
- Buying something because you know a few people that use it and like it. Even in your practice area.
- Being sold on what the software “does” and not what you can get out of it.
- Don’t make assumptions about what you think it does.
- Not enough training.
- Not customizing.



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Tips & Techniques

- Start with one feature at a time if possible.
- Be ready for problems and resistance.
- Don't be the person who researches and demos first.
- Don't be the firm contact.
- Don't quit too soon.
- Don't hang on because you spent all that money.
- Pay for floor support.

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Questions?



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