



# LAW FIRM CLOUD MIGRATION GUIDE



PROS AND CONS  
PREPARATION  
PROCESS  
CASE STUDIES



# LAW FIRM

## CLOUD MIGRATION GUIDE

You may be considering moving your law firm's data to the cloud for a variety of reasons:

- Your in-house servers are aging and will soon need to be replaced
- Your IT costs have recently increased
- Your network has grown increasingly unreliable
- You are concerned about ransomware and other hacks
- You want to keep your technology up-to-date

Whatever your reasons, you should know before you make your final decision both the advantages and disadvantages of having your law firm's data in the cloud. Below is a comprehensive list.

Should you decide to move forward with a migration, preparation steps, an explanation of the process, and case studies are also included.

# PROS & CONS

## OF MIGRATING

### PROS



#### 1. Reduced IT Costs

Once in the cloud, your firm saves money three ways:

- (a) You no longer need to spend money upgrading or replacing infrastructure: replacing servers, adding cable, or buying PCs (you can substitute inexpensive thin client devices for desktops).
- (b) You save money on software licenses. Many are rolled into your monthly hosting cost.
- (c) Your monthly fee for tech support will be lower because there is no longer a network to maintain.

You benefit from the massive economies of scale that result from hundreds of thousands of cloud users being aggregated. Cloud providers like Amazon Web Services, which own the infrastructure that you use, pass a portion of these economies along to their customers.

#### 2. Anywhere Access

You need only have an internet connection to access your data and applications from any location you choose to work.

Whether at the courthouse, working from home, traveling on business, or enjoying some vacation time, your files and software are available to you 24/7.

No longer do you have to email your data to yourself, or use clunky remote login software to connect from offsite. Simply use your laptop or home desktop to connect; their screens will appear exactly the same as your office screens.

Every application and every bit of data is fully available to you wherever you choose to work.

# PROS & CONS

## OF MIGRATING

### 3. Any-Device Access

Need to review some files while standing in line with only your smartphone in hand? No problem.

Want to use your iPad to read through some documents? Easy.

Laptop? Home desktop? Have at it. Any device that can connect to the internet can be used to access your data and applications. Use whatever device you choose; your office is accessible with all of them.

### 4. Stronger Security

Major providers of cloud services will have security measures in place that your on-premises network can never come close to matching.

For example, Amazon Web Services, the largest provider of cloud services in the world and the cloud host that [James Attorney Cloud](#) uses, has built their data center and network architecture to meet the requirements of the most security-sensitive organizations, including the Department of Defense and the CIA.

Amazon has in place:

- **Amazon GuardDuty** is a managed threat detection service that continuously monitors for malicious or unauthorized behavior. It monitors for activity such as unusual API calls or potentially unauthorized deployments.
- **Amazon Inspector** automatically assesses applications for vulnerabilities or deviations from best security practices.
- **Amazon Macie** is a security service that uses machine learning to automatically discover, classify, and protect sensitive data. It provides alerts when it detects risk of unauthorized access or inadvertent data leaks.

# PROS & CONS

## OF MIGRATING

- **AWS IAM.** Identity and Access Management securely controls access to Amazon Web Services for your users.
- **AWS WAF** is a Web Application Firewall that protects your applications from common web exploits that could affect availability, compromise security, or consume excessive resources.

After migrating, you can stop worrying about the ransomware attacks that have hit so many law firms, or hacks that are likely to succeed in the future against the notoriously lax network security at so many law firms.

### 5. Automated Backup and Disaster Recovery

When your server, data, and applications are stored onsite, your law firm is vulnerable to:

- Software corruption
- Hardware failure
- Human error
- Viruses and ransomware
- Fire, flood, earthquake, tornado, or other natural disaster

Picture a fire sweeping through your office.

If your data and applications resided on an in-house server and network, your law firm's operations would cease until a replacement server could be obtained and your last backup restored. Work done after the last backup and before the fire would be lost.

With your data in the cloud, so long as you had laptops offsite, work could continue uninterrupted from attorney and staff homes, temporary co-working space, or replacement offices. Clients would be unaffected.

# PROS & CONS

## OF MIGRATING

When your data and applications are stored in the cloud, they are protected by redundant storage in multiple data centers, automated backups, and the high levels of security detailed in #4 above.

For example, Amazon Web Services, which we use to host our law firm clients' data, is designed for 99.999999999% (11 nines) durability of the data it stores. Your onsite network cannot come close to that level of data durability.

### **6. Virtually Unlimited Storage**

When you use onsite servers, you have to purchase more capacity than you plan to use. Otherwise you will run up against storage limitations.

In the cloud, your data storage capacity is infinitely elastic and you will never run out of space. This unlimited capacity can be especially attractive to new and fast-growing law firms, for you pay only for the space you need.

### **7. Quick-and-Easy Staff Setup**

When you use your own network, setting up a new workstation can take hours. You need to unpack the PC, run the setup wizard, connect to the network, and install your applications.

When using the cloud, the task is cheaper, simpler and faster. First off, you don't need to buy a PC. Instead, purchase a thin client device for a few hundred dollars. Plug it in, create login credentials for your new hire, and log into your cloud network. It is that easy.

Ditto for cutting off a discharged team member – simply change the password and delete the profile, and in five minutes you are done.

# PROS & CONS

## OF MIGRATING

### **8. No Ownership Responsibilities**

Once you move to the cloud, your law firm's aging technology infrastructure is no longer your responsibility. No more shopping for hardware, replacing cable, evaluating remaining server capacity, upgrading old equipment, or being the person everyone contacts when a network issue arises.

After the migration, your cloud provider handles everything, and your cost is a fixed monthly fee. You face no unexpected equipment expenses because you now only own small and low-cost items. The few technology issues that arise generally concern peripherals like printers, for your cloud never goes down ... unlike the server network you used to own.



## CONS

### **1. Reliable, High-Bandwidth Connection**

You will need a commercial-grade internet connection. If you lose connectivity, you lose access to your data and applications.

And your connections should be high bandwidth so that your applications run speedily. Most of our users experience an uptick in processing speed once they migrate, but that won't be the case if you have a poor internet connection.

### **2. No Intensive-Use Apps**

Applications and software that require extensive computing resources, like AutoCAD, creative tools, health monitoring systems, and desktop accounting software, will not run on the cloud and should not be migrated.

### **3. Shared Offsite Location**

Your data is stored in data centers together with that of other users. You are given a private workspace, but the servers are still shared. Some users find it difficult to become comfortable with the concept of server sharing.



# PROS & CONS

## OF MIGRATING

#### 4. Compliance Questions

You will want to make sure that your chosen cloud provider complies with all data protection and privacy laws.

The private cloud solution through Amazon that we offer meets all law-firm compliance requirements.

Amazon Web Services infrastructure is certified for compliance with:

- HIPPA (Health Insurance Portability and Accountability Act)
- ISO 27001 (International Organization for Standardization)
- SOC (Service Organization Controls)
- SSAE 16 (Statement on Standards for Attestation Engagements)
- FedRAMP (Federal Risk and Authorization Management Process)
- PCI DSS (Payment Card Industry Data Security Standard)

# PREPARING FOR YOUR MIGRATION

## **1. Select a cloud provider who specializes in law firms and has been in business for years**

Your provider should be familiar with commonly-used server-based legal applications, and have experience migrating them to the cloud. Examples include:

- Amicus
- Bankruptcy Pro
- I Got Notices
- iManage
- Juris
- Needles
- PC Law
- QuickBooks
- Smart Advocate
- Tabs 3
- Time Matters
- Worldox

Law firms are different than most small companies. Revenue is highly production-dependent, and downtime is costly. So their cloud migrations must not interfere with daily work. A cloud provider who specializes in law firms will understand and accommodate that need.

A migration is not the time to experiment with a newly-formed business. Yes, startups can do great work, but you entrust your data to your chosen vendor when you obtain a cloud migration.

You should recognize the name of both the ultimate host (e.g., Amazon, Microsoft, Google), and the vendor handling the migration and delivering the subsequent IT support.





# PREPARING FOR YOUR MIGRATION

## **2. Review your current IT support contract and give the required notice to your contractor**

You may have a provision in your current network maintenance contract that requires advance notice before termination.

If you are using a local IT firm for network maintenance, you will probably drop them and substitute a cloud provider with a national presence who specializes in law firms.

Local IT support will not longer be required after your migration. Your IT maintenance needs will plummet post-migration, and most of your IT support needs going forward will concern either legal software or peripherals like printers.

IT support is one of the big areas you will save money. Your monthly IT support cost will decline due to fewer issues arising. And fewer technology issues mean less time spent dealing with urgent, high-impact problems.

# THE MIGRATION PROCESS

Here is how [James Attorney Cloud](#) handles its migrations of law firms to the cloud. Other vendors may operate differently.

We begin by sending a multiple-choice Intake Questionnaire that outlines your technology usage for us. We then schedule a follow-up call to review the Intake Questionnaire, exploring items like:

- List of all client's software
- What versions of software client uses, along with any licenses pertaining to software
- Is software server based, or cloud based? How many people access this software?
- Hardware devices: such as make/model of printer(s) and scanners, VOIP phones, etc.
- What type of network is client using? Are they on a domain? Are they in a Workgroup?
- Does firm use Windows PCs, or Macs? Do they use both?
- Ask client to provide current network shares along with permissions to said shares
- We will remote into server (if applicable) and document how much data in Gigabytes that need to be transferred to the cloud.
- Instruct client to save all local documents, shortcuts, browser bookmarks/favorites, and any other data needed to a folder designated by JP on the server.
- Gather local PC and/or Mac credentials for each user; if applicable, gather login credentials for router/firewall, server(s), and any applications needing authentication
- Get client setup on VPN (Optional for Office IPSEC VPN)
- What ISP is firm using? Are they using broadband? DSL? Fiber? Run a quick speed test on client's network.

# THE MIGRATION PROCESS

After this call, we create a Plan of Action and Milestones for the migration, and then begin work.

We transfer all your applications, documents, and data to a private workspace on Amazon, the largest provider of cloud services. Amazon Web Services has more than 1 million customers. 2,000 are government agencies, including the Department of Defense and the CIA.

This transfer is usually completed in one evening.

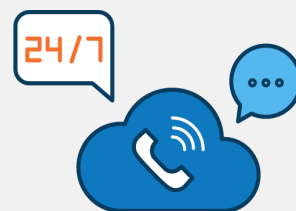
The next morning your computer screens, including shortcuts and icons, remain as before. But now you can access your documents from anywhere there is an internet connection.

And you can use any device – smartphone, iPad, laptop, or desktop. You don't even need a bulky box under your desk anymore; a tiny \$200 thin-client device along with monitor and keyboard will be sufficient.

## **24/7 Tech Support Included**

Along with our cloud migration comes U.S. based tech support with a guaranteed response time of one hour ... no matter what time or day you call.

Remote monitoring is included, which helps us predict and anticipate your team's needs.



# CASE STUDIES

## RECENT CASES

### Hammerschmidt, Stickrad & Associates

**Locations:** Royal Oak and Wyandotte, Michigan

**Specialty:** Bankruptcy

**Hardware:** 5 users, PCs and Macs, 2 printers, 1 scanner, Arris server

**Software:** BestCase, LawPay, Office

**Email:** Office 365

**Weaknesses:** No disaster recovery plan, limited backups, used hard copies for offsite access



*The Hammerschmidt Stickrad firm was highly vulnerable to disasters and hacks, and was still dragging around hard copies for offsite work. Now, with their pure cloud setup, automated nightly backups, redundant storage, and Amazon-level security, they need no longer worry about disasters or hacks shutting them down. And the easy offsite access has eliminated the need to produce and carry home hard copies.*

# CASE STUDIES

RECENT CASES

## Marc Shefman

*Location:* Southfield, Michigan

*Specialty:* Social Security Disability

*Hardware:* 3 users, PCs, 4 printers and scanners, NAS server

*Software:* Clio, Dropbox, QuickBooks, Word

*Email:* Office 365

*Weaknesses:* Backups stored onsite

*Mr. Shefman was using a desktop version of QuickBooks, which is server-based. We moved his QuickBooks to the online version, migrated all his remaining data and programs to the cloud, and cleaned up his data during the process. He no longer has the exposure to disasters that he had with his onsite backups, and now has easy access from any location and any device.*



**MARC J. SHEFMAN**

*Detroit Social Security Disability  
Attorney*

HOME

AREAS OF PRACTICE

ATTORNEYS

CONTACT

BLOG

CONNECT



# CASE STUDIES

## RECENT CASES

### Steadman Law Firm

*Location:* North Charleston, South Carolina

*Specialties:* Bankruptcy, Real Estate, Wills and Probate

*Hardware:* 5 users, one PC, rest Macs, MacMini server, 6 printers, 4 scanners, plus smartphones, tablets, and laptops

*Software:* BestCase, Clio, LawPay, QuickBooks, and SoftPro

*Email:* Rackspace

*Weaknesses:* Limited security, difficult offsite access, high IT costs

**Over 35 years  
Experience  
Work For You**

- CHAPTER 7  
BANKRUPTCY**  
Get a fresh start by wiping out all qualifying debts, including credit ...  
[Start A Fresh >](#)
- CHAPTER 13  
BANKRUPTCY**  
Repay your debt over a three-to five-year period according to a...  
[Wage Earner Plan >](#)
- REAL ESTATE  
LAW**  
Solid representation to protect your interests during the closings...  
[Real Estate Issues >](#)
- WILLS AND  
PROBATE**  
Preparing wills, living wills, health care power of attorney...  
[Get A will >](#)

*The Steadman firm reaped all the core benefits of a cloud migration: financial-grade security, near-total data durability, easy access from any location and any device, and reduced IT maintenance and support costs.*



# CASE STUDIES

## RECENT CASES

### Niblock & Associates

Locations: Stuttgart, Searcy, Little Rock and Pine Bluff, Arkansas

*Specialty:* Bankruptcy

*Hardware:* 18 users, PCs, plus smartphones, tablets, and laptops

*Software:* BestCase, I-Got-Notices, Office, PracticeMaster, Tabs 3

*Email:* Office 365

*Weaknesses:* Old server, slow access

Having Trouble Paying Your Bills?  
**WE FIGHT FOR YOU!**  
HIT the **RESET** Button

The advertisement features a man in a suit smiling. Below him is a row of logos and awards: Member of the National Association of Consumer Bankruptcy Attorneys, Avera 10.0 Super Top Attorney Bankruptcy, BBB Top Rated Business, ASI Top 10 Lawyer, 15th Anniversary, American Jurist Institute Top 10 Attorneys, American Jurist Award of Excellence, and 2016 Top 10 Bankruptcy Attorney.

*BestCase and I-Got-Notices are server-based programs, but all the benefits of cloud computing can still be obtained with a migration. All of Mr. Niblock's data is now consolidated in one place, his team is enjoying iPad access, and as attested below, the high-speed access is a godsend for the team members in the satellite offices.*

"We have 4 offices in Arkansas, and it was always a problem gaining access to our network from our satellite offices. Access was very slow, and people would get mad because it would take so long to open files. The new cloud setup James put in place is fast, really fast, and folks are loving the new high-speed access."

Greg Niblock  
Niblock & Associates

# RUN YOUR LAW FIRM IN THE CLOUD

## Secure

Stop worrying about ransomware and viruses

## Accessible

Login to your legal software from anywhere

## Simple

Block or permit personnel access with a few clicks

## Affordable

Costs less than maintaining a network

# LAW FIRM SPECIALISTS

## More than 100 clients

We provide technical assistance to over 100 law firms. We serve no other type of client.

## Broad and deep

Our tech team contains 15 legal experts with a variety of technical skillsets and backgrounds.

## Since 1981

We have been helping lawyers for over three decades. We have focused on legal technology since 2010.

# BENEFITS

BY MOVING TO THE CLOUD, YOU WILL:

## Spend less

- Drop your costly network maintenance vendor
- Use \$200 thin devices instead of desktops
- Never buy another server

## Save time

- Block access of ex-employees with a few clicks
- Ditto for replacement employees
- Adding new workstations takes only a few minutes

## Stop worrying

- Staff can no longer infect your network with viruses
- Hijackers are unable to hold your data for ransom
- Network crashes are no longer part of your work life

# MORE INFORMATION

Greg Powers is available to explain law firm cloud migrations in more detail, provide names of law firms we have recently migrated, explore your particular situation, and answer your questions.

Greg may be reached at **714.409.5481**, or **[greg@jamesattorneycloud.com](mailto:greg@jamesattorneycloud.com)**.