



Friday, Nov. 8, 2019  
9:15 AM – 10:30 AM

### **The Solo/Small Firm Mobile Lawyer Toolkit: What You need to know to Practice on-the-go**

Want to level up your remote working? These days, mobile practice is not limited to just using a laptop and a smartphone at a coffee shop. Discover how to use technology to ditch the legal pad and collaborate more effectively with your firm's employees and clients, regardless of location.

Come hear small firm and in-house attorneys discuss their views on best practices for today's lawyers working on the go. Discussion topics will include (1) how to use an iPad for note taking, document review, presentations, and at trial; (2) an overview of collaboration tools; (3) strategies for maintaining client confidentiality at co-working spaces; (4) cybersecurity and coverage; (5) what technology used at larger firms and companies can be adapted for solo and small firm attorneys.

#### **Moderator:**

Vivian Kim, Hanmi Bank

#### **Speakers:**

Sam You, Ro & You LLP

Sharlene Lee, Nevers, Palazzo, Packard, Wildermuth & Wynner, PC

Angel Lin Garrett, Trucker Huss, APC

Purnima Boominathan, Doctors on Demand

# The Solo/Small Firm Mobile Lawyer Toolkit: What You Need To Know To Practice On the Go

Purnima Boominathan, Angel Lin Garrett,  
Vivian Kim, Sharlene Lee, and Sam You

# . Discussion Topics

- Want to level up your remote working? These days, mobile practice is not limited to just using a laptop and a smartphone at a coffee shop.
- Today we will be discussing:
  - (1) Using an iPad/tablet;
  - (2) Overview of collaboration tools;
  - (3) Maintaining client confidentiality;
  - (4) Cybersecurity and coverage; and
  - (5) Accessible and user-friendly technology used at larger firms and companies that can be adapted for solo and small firm attorneys.

# Panel

- Sam You, RO & YOU LLP- Mr. You is a founding partner of his five-attorney workers compensation defense firm, with locations in Sherman Oaks, CA and Dublin, CA.
- Sharlene Lee: Nevers, Palazzo, Packard, Wildermuth & Wynner, PC- Ms. Lee is an employment and litigation associate at a fifteen-attorney firm in Westlake Village, CA.
- Angel Lin Garrett, Trucker Huss, APC: Ms. Garrett is a partner at her thirty-attorney, ERISA and employee benefits firm in San Francisco, CA.
- Purnima Boominathan: Doctor On Demand- Ms. Boominathan is based in Washington, DC, where she is Associate General Counsel at Doctor On Demand.
- Vivian Kim, Hanmi Bank: Ms. Kim is based in Los Angeles, CA, where she is General Counsel of Hanmi Bank.

# Using Your iPad

- Taking notes- GoodNotes, Notability
- Reviewing Documents- iAnnotate PDF, Documents by Readdle, GoodReader, DocReviewPad
- Deposition Review- TranscriptPad, Mobile Transcript, WarRoom
- Presentations - Keynote, Powerpoint, Google Slides, Logitech Spotlight, Battery Pack
- Trial- TrialPad

# BYOD Policies

## Sample Electronic Communications and Personal Device Policy

This policy applies to all voice mail, e-mail, instant messaging, text or app messaging, Slack chats, and other electronic communications made for Company purposes or using Company accounts (collectively, "Electronic Communications"). This policy also applies to all personal devices used for any work for the Company, including without limitation computers, laptops, tablets, smartphones, and storage drives ("Personal Devices").

Electronic Communications are Company property. All files, documents, data and messages sent, received, composed or made using Electronic Communications are the property of the Company. The Company may inspect all Company files or Electronic Communications at any time for any reason at its discretion, including without limitation inspection of any Personal Devices used for Company work. You may also be required to provide copies of Electronic Communications and Company files stored on your personal accounts or property. For this reason, you should keep all Electronic Communications and Company files separate from any personal files and communications. Additionally, you should not store sensitive personal files on any Personal Devices used for Company work. Participation in Electronic Communications or use of Personal Devices for Company work constitutes consent to this policy.

# BYOD Policies (Cont.)

All Electronic Communications will be treated as business messages. Employees who engage in Electronic Communications to create or maintain personal information have no right of privacy with respect to that information. Any employee who sends personal messages using Electronic Communications, including on Personal Devices, should be aware such messages will be viewed as a business message and not a personal, confidential message of the employee — in other words, Electronic Communications may best be regarded as a postcard rather than a sealed letter. Any use by an employee of a private account or Personal Device does not entitle that employee to any confidentiality, and there should be no expectation of privacy, in Electronic Communications.

The Company's confidential or proprietary information should not be transmitted outside the Company or even to employees within the Company unless such recipients are authorized to receive such information. Employees are expected to comply with established information security policies and procedures, and to fully cooperate with any security investigation. Any employee violating this policy or misusing Electronic Communications and/or Company accounts may be subject to discipline, up to and including termination. Employees may also be held personally liable for any violations of this policy.

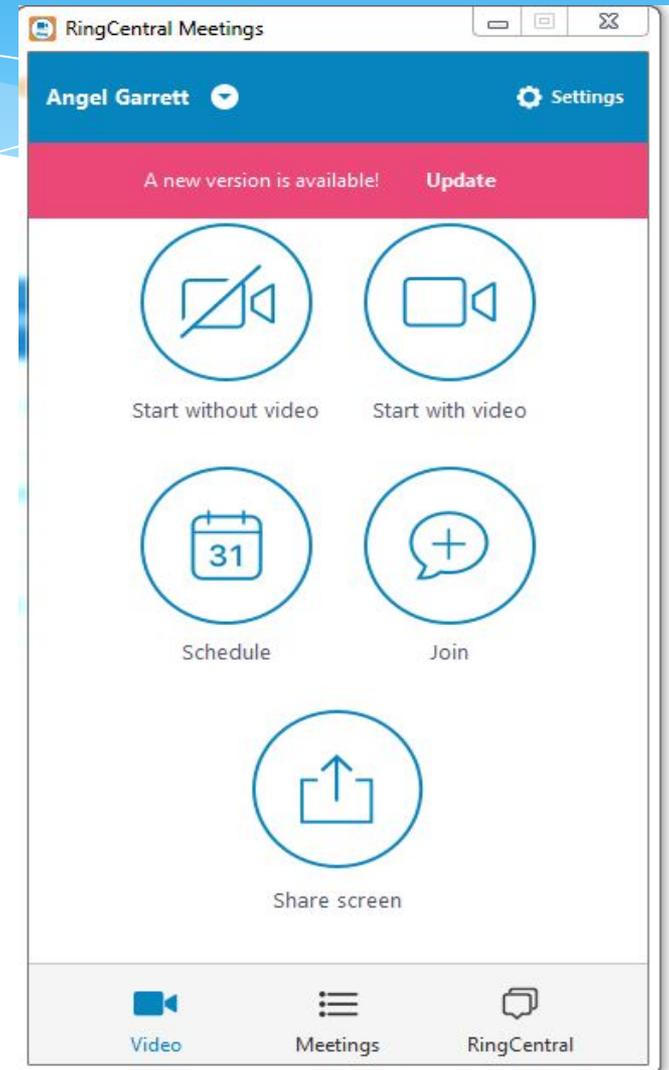
# BYOD Policies (Cont.)

An individual who causes damage to any Company files may be held liable for any unauthorized access, misappropriation, destruction, and/or damage including, but not limited to, any impairment to the integrity or availability of data, programs, systems, or information. Upon termination of employment, an employee shall not modify or delete any software or data, alter damage, corrupt, or delete any files containing Company information. Employees who have used personal devices for Electronic Communications must provide the Company with access to such devices in order for the Company to delete all Electronic Communications and other Company files from the devices.

# “Hi, Can you hear me? Can you see me?”

## Collaboration Apps:

- RingCentral – All-in-one service
  - Set up conference calls
  - Fax
  - Record calls
  - Call logs
  - Forward calls
  - Voicemail
  - Instant message



# Collaboration Apps (Cont.)

- Videoconferencing- Zoom, Google Hangouts, Slack, Skype, WebEx, GoToMeeting, Signal, WhatsApp
  - remote depositions/testimony
  - meetings with clients, co-counsel, and opposing counsel
  - virtual mediation
  - internal meetings
- Group Messaging- Slack, WhatsApp

# WiFi/Mobile Hotspots

Are you on-the-go securely? Think about...

- WPA Authentication
- VPN
- Mobile Hotspot Devices
- Turning Off File Sharing
- Limiting connectivity
- Utilizing browser extensions (force use of https://)
- Using Two Factor Authentication
- Mobile multi-factor authentication
- Storing documents only in the cloud

# Operating on a Cloud

- Amazon Work Spaces (AWS)
  - Pros: Dominance in the public cloud market; the most mature, enterprise-ready provider, with the deepest capabilities for governing a large number of users
  - Cons: Cost
- Microsoft Azure
  - Pros: Tight integration with Windows software; discounts for existing enterprise customers
- Google Cloud Platform (GCP)
  - Pros: High compute offerings like Big Data, analytics and machine learning; more open-source-centric
  - Cons: Doesn't offer as many services and features; not as many global data centers
- Practice Specific Programs/Applications

# Calendar Apps

- Importance of Integration
  - There's no correct program, just the right program for you
- Use of software such as CompuLaw which is a rule-based software that helps determine deadline.
  - Pros: Great for litigation, includes local rules
  - Cons: Does not always capture all the nuances of certain judges, requires manual entry for dates set by court orders

# Secure File Transfer

- Secure file transfer and sharing is key to ensuring that client information is protected.
- Various vendors offer this software - Dropbox Business, Citrix Sharefile
- Very low price - \$12.50/month for 3 users with 3 TB of storage (Dropbox Business) to \$122/month for 5 users with unlimited storage (Citrix Sharefile)

# Citrix Sharefile

AG

Hello Angel

[Add profile picture](#)

 Edit Das

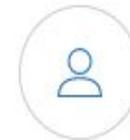
## Shortcuts



Share Files



Request Files



Personal Folders



Shared Folders



Favorites

# Cybersecurity Issues and Insurance

Do you have Cyber Insurance?

- Understanding the potential risks
- Prevention and Compliance
- Training
- Recourse

# Cyber Insurance

- Extent of coverage -- cyberattacks, data breaches, data loss and restoration, legal fees, regulatory fines, extortion, etc.
- Amount of coverage
- First-Party v. Third-Party coverage
- In general , for small firms, the annual premium for coverage for \$1 million ranges from \$1,000 to \$3,000

# Remote Access

- There are various ways in which working remotely can be done seamlessly.
- Three examples of remote access are:
  1. **VPN** - Virtual Private Network which allows users to send and receive data across shared or public networks; it works as if the firm's computers are directly connected to the private network
  2. **Citrix** - Citrix offers a workspace that allows you (or your employees) to log in once into a unified and secured workspace.
  3. **Cloud-based Platforms**- AWS, Azure, Google

# E-Discovery

With email correspondence, virtually all cases require e-discovery and, therefore, requires software to assist in the gathering, processing, reviewing, and production of various files.

1. RFP/RFI for vendors
2. Choose a platform
3. Data disposition

# Show me the Money (\$\$\$)!

- Lawyering on-the-go and taking care of your money (and your clients' money) on-the-go
- SHOW ME THE MONEY!
- Compliance, Compliance and Compliance