

Moving Your Law Firm to the Cloud with LexisNexis and Uptime Legal

Whether you're a solo attorney, a practice with multiple locations supporting dozens of lawyers and support staff, or something in between, moving your law firm to the cloud can seem like a daunting endeavor—especially after years of working with and maintaining a non-premises server.

Why? Because many firms have their most valuable asset—the data for their entire law practice—on that server. That means if it ever goes down, or there are other issues, productivity hits a standstill. And, because of the typical server setup, accessing information while outside the office can be a challenge, if not an impossibility, for some firms.

Not to mention what would happen if a natural or other disaster struck: all their client and billing information might be lost forever.

These were some of the challenges that Shasta Legacy Law Center was dealing with, and why they decided to pursue a better, more secure—and less stressful—way to run their law practice.

BUILDING A REMOTE LAW PRACTICE WITH AN EYE ON MOBILITY

Shasta Legacy Law Center is an estate planning practice run by the husband-and-wife attorney team of Nina and Brian Whitehurst. They serve older clients in the less-accessible and less-populated areas of Northern California that have, “more livestock than people,” Brian says.

Providing legal services to these clients means that Nina and Brian do a lot of traveling. “We’re helping small communities that are underserved. Older folks don’t want to travel far,” Brian says. “So, we have a system with a portable scanner, laptop, printer, and we go to them. We had one client who was in a snowy, mountainous area. She was stuck at her house, so we had to go to her house through the snow.”

To provide the kind of legal care and service their clients needed, Nina and Brian built a mobile law practice. Building their law firm with mobility in mind meant that they needed tools that could work with their practice. But, they also had a physical server in their office they needed to sync with on the road, which sometimes proved nearly impossible.

LOSING PRODUCTIVITY, DOCUMENTS AND MORE

“We were using a portable hard drive when we were with clients and sync[ing] that to our physical office server,” Brian recalls “Those syncs could be a nightmare. We sometimes lost documents during the sync. For whatever reason, they would just disappear. When we’d be doing a sync, we’d be watching it closely. Sometimes it would go overnight because it would be a lot of data. Then you’d wake up in the morning hoping it went well.”

Because the physical server lived in the firm’s office, working from home wasn’t possible. This kept Nina and Brian figuratively chained to their desks at the office if they wanted to work with their PCLaw® software for their timekeeping, billing, and accounting needs, hindering the firm’s productivity.

IT ISSUES AND SECURITY CONCERNS FACTOR IN

At the time, Nina and Brian were also having issues with their IT and security.

“The security issues were a lot of stress. Lawyers have time constraints. Sometimes there are tech issues, and if it was beyond my ability, I had to hunt down someone who could come help us,” Nina added. “We didn’t have a lot of good choices for that. We had some real hassles. Waiting for someone to fix a tech issue could bring the practice to a standstill. It created loads of stress, lost time, and paying for tech help that didn’t turn out to be help at all.”

The firm liked using PCLaw, but they didn’t want to keep backing up their data and doing overnight hard drive syncs to their server, hoping that data wouldn’t be lost.

FINDING RELIEF BY HOSTING PCLAW WITH UPTIME

But everything changed for the better when they decided to host the PCLaw software they already loved with Uptime Legal Systems, one of LexisNexis® Authorized Hosting Providers. Helping them say goodbye to the IT and security hassles that had literally been keeping them up at night.

By moving their law practice to Uptime-hosted servers, Nina and Brian had what they’d needed all along: their entire law firm, and their PCLaw software, accessible in the cloud, from any device with Internet access.

Finally, they could work from anywhere, whether it was the office, a client’s home, or their own home. And, Uptime came with unlimited IT support, which Brian loved.

“What really kind of sold us was the IT side. Before using Uptime, I was everything from the janitor to the IT guy, and getting buried trying to fix things. We work from home too. But, having to physically sync with a server prevented us from doing that.”

Uptime allowed Nina and Brian to work from wherever they wanted in a way that they could best serve their clients.

CLOUD MIGRATION MADE EASY

Migrating their servers to the Uptime cloud from their original on-site server seemed like a scary process at first, but Uptime eased Nina and Brian's concerns.

"We planned it pretty well. We talked to Uptime, set up a date and time to make the move. Uptime did an inventory of our devices, so their techs could work on the migration and setup," Brian added.

Even though they described their dual home/office IT setup as "complex," Uptime techs made the whole process simple.

"We just sat and watched. They mailed us a hard drive, walked me through how to plug it in to take the data. We shipped it back with the materials they provided, and boom, the next day the data was migrating to the server," Brian added.

"You could have been 'not tech savvy' and got through it. There was nothing that I couldn't understand. I expected a lot more stress and sweat than I had, but it was pretty painless."

KEEPING PCLAW UP AND RUNNING

Even their biggest concern—extended downtime from PCLaw—was a non-issue during their migration, thanks to Uptime's pre-planning process.

"We thought we were going to be totally down for three days, and we weren't," noted Brian. We were maybe down for half a day without access, and we probably had more than we thought we had. And we hit the ground running, within a day."

Since they moved to Uptime's private cloud, Uptime takes care of all the firm's IT needs. No need to call and wait on multiple vendors or try and figure it out themselves. "Uptime now fixes it and it gets done. That's a big difference."

OUT: SERVER STRESS, TECH HEADACHES

With Uptime, server headaches are a distant memory for the firm, and productivity is up.

No more time spent brawling with IT problems.

No firm-wide shut-down issues like they had before.

Stress is down.

And, importantly, Brian notes, "We don't spend as much time ranting and raving. I used to always have to vent for a while when servers went down, and I don't need to do that anymore. Everyone's happier."

Security was always a major concern in the past, but no longer. When traveling, Nina and Brian had to worry about their portable hard drive. "We always had to make sure the hard drive was with us because we couldn't lose it. It had very sensitive data."

Now, with everything in a secure private cloud, their information is safe, and they can access it anytime they need.

“Before Uptime, every time we logged out of PCLaw we had to back up our data. It could take a minute or two. In the modern computer age that’s an eternity. With PCLaw in the cloud you just save and then close it. Uptime is taking care of all that.”

IN: PRODUCTIVITY, PEACE OF MIND

Nina and Brian still visit clients in their homes, but the hard drive stays back at the office. “Now, we can go log onto the cloud,” Brian says. “Most folks have decent wi-fi, and then we can easily sync our documents to the cloud.”

And their PCLaw software in the cloud has been faster and easier to use than ever for the firm. “Before Uptime, every time we logged out of PCLaw we had to back up our data. It could take a minute or two. In the modern computer age that’s an eternity. With PCLaw in the cloud you just save and then close it. Uptime is taking care of all that.”

Their bottom line has improved, too, as the firm is more productive than ever. They can easily make house calls to visit clients and not worry about data or sync issues. Brian says they’ll even fly themselves to help their clients. “Nina and I are both pilots. We’ve flown to visit clients before, and that’s kind of fun,” he adds.

Another benefit to their cloud setup: Nina and Brian were able to hire a remote employee to help reduce their workload by handling the firm’s sizable document production needs, something they couldn’t have dreamed of before.

LIVING IN THE CLOUD FOR GOOD

Now, Shasta Legacy Law has no need for physical servers and has no plans to go back.

Brian says, “After seeing the difference, [law firms are] crazy sticking with a physical server. I’m going to haul ours off, get the data scrubbed, and put it up for sale. If you find anyone who doesn’t want to make the move to the cloud, have them call me. I can give them a deal on a server!”



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