



WHITE PAPER

HEAD FOR THE CLOUD IN A STORM:

Maintaining your firm's business continuity
during a crisis



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Would your firm be able to function seamlessly if another pandemic or major business disruption forced it back into operating virtually?

It's a question many firms are grappling to answer. While the majority were able to adjust and maintain remote business operations through initial shutdowns related to COVID-19, for most the process was not easy or sustainable in the long term.

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Michael Hernandez is a civil litigation attorney at the Woodland Hills, CA, office of [DaCorsi Placencio, PC](#). As with so many other attorneys accustomed to working in the office, the initial transition to working from home was an adjustment. "I'm used to having access to things in multiple formats," he explained. "If I don't find the electronic version of what I need right away, I always have the paper file as a backup. So, while I'm fairly comfortable with tech, going exclusively electronic while working from home has been a challenge."

While firms have a much better picture of their ability to function in a non-traditional environment, there is a good chance that the pandemic shed light on some notable gaps that needed to be addressed. Clearly, most firms were able to develop processes that—for better or worse—allowed them to complete requisite tasks during the pandemic. The question that remains, however, is whether the firm merely survived or was able to thrive in the face of unprecedented adversity. If it was a matter of survival, what can—or should—firms do differently if a similar situation arises?

Whether the catalyst is a new pandemic or some other crisis such as a natural disaster that significantly impacts business operations, firms must create an environment that allows its business to continue seamlessly. This could mean a move to the cloud that ensures the infrastructure for a smooth and uninterrupted transition from working in the office to working from home.

THE MARRIAGE OF TECH AND BUSINESS CONTINUITY

There is little doubt that legal tech is the glue that held many firms together during COVID-19. Think about how different the day-to-day lives of legal professionals would have looked if the pandemic had hit even ten years ago. At that time, most firms didn't have laptops, and a large number of attorneys still relied on print libraries. In order to work on the matters they had in progress, many attorneys would have been limited to phone, personal email, and whatever paper files and books they could carry. And, that's just the work the attorneys are doing. It doesn't take into account all of the firm's back-office functions and the contributions of the support staff.

At the forefront of maintaining business continuity is the impact it has on clients. Clients look to their firms for advice on critical legal matters, and those inquiries tend to increase during uncertain times. They want to know that their interests are protected and that the firm is able to successfully and seamlessly navigate unforeseen disruptions. Having their firms conducting business as usual is one of the best signs they can receive.

Travis Adams is an associate on the personal injury and litigation team at the firm of [Melchert Hubert Sjodin](#). He says that, while he hasn't seen the COVID-19 pandemic directly impact his clients' general anxiety about pending matters, some of its ripple effects have. As Adams explains, "I have seen wage loss disputes created in the workers' compensation context due to workers who were on work restrictions because of work injuries being furloughed. I have also seen clients become concerned regarding when their hearings or trials would be scheduled due to the uncertainty around the courts' ability to reschedule hearings. That creates additional stress."

These types of outside client stressors should make the focus on maintaining regular business operations that much more of a priority for law firms. Clients take solace in anything that helps to create a sense of normalcy during turbulent times. When employers and courts are understandably focused on their own interests during a crisis, it's crucial that clients can trust that their law firms are operating as usual to protect theirs.

In reality, however, firms will almost certainly face some disruption to their business operations. Decreases in attorney productivity, hiccups in back-office operations, and limitations on internal collaboration can all be challenges that need to be addressed. So, how do they do it? Many firms are using cloud-based solutions as the foundation of their business continuity and crisis management plans.

This white paper will focus on some of the key business continuity considerations firms should include in their plans and how legal tech—specifically the cloud—plays a critical role.

THE CORNERSTONES OF YOUR PRACTICE

COVID-19 and the resulting work from home mandates laid bare the importance of every staff member at the firm having remote access to the tools they used in the office. For perhaps the first time in many of their histories, firms were forced to support an entirely remote workforce. While some had an easier time of it than others, most of them likely had room for improvement in terms of better connectivity and overall productivity.

Cloud-based solutions have made the shift to a virtual office much easier for firms of all sizes. Let's

take a closer look at some of the key elements of your firm's practice and how tech can help:

Matter management

Working remotely can make keeping track of tasks for a particular matter difficult. There are solutions on the market designed to help firms stay on top of critical tasks during business interruptions, but the tech is only useful if lawyers can access it when and where they need it.

Client communication

Client meetings, document review and signing, and other client-facing activities need to continue, even when attorneys are working from home. Client portals and video conferencing technology can help to fill this gap when in-person meetings are not an option. But they are of little use if they are only available via a firm's on-premises network.

Legal research

Quickly finding accurate information related to a client matter is something that will always be a must-have for any attorney, especially during a crisis. Clients will still have questions, and their expectations for quick resolution will not diminish to accommodate an unusual work environment.

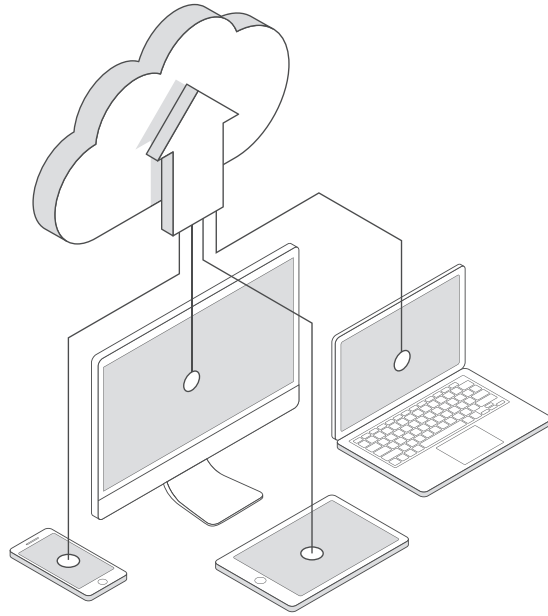
Time and billing

The firm's business does not stop just because of a mandatory stay-at-home order. Work must continue, and firms will still need a way to submit invoices. With many firms' time and billing solutions being housed in on-premises networks, however, getting work done remotely can be a challenge.

Interaction with the courts

In an effort to limit large crowds of people at government facilities during the pandemic, some

courts decided to handle certain types of hearings and other business virtually. Some experts speculate that at least a portion of these changes could become permanent. If they do, or if a new crisis once again closes the courts, it becomes twice as important to have a reliable video conferencing or other court-approved remote access communication solution in place.



FIRSTHAND INSIGHT

Firms rose to the challenge when they were thrust into the unknown at the beginning of the pandemic. At that time, there was no playbook they could use, and no precedent they could refer to for help developing a plan. The vast majority were left to find a solution on their own. Firms in other parts of the world that navigated the pandemic before it came to the U.S. found that having the right technology in place was key to keeping business operations running smoothly.

Warren Hua is a member of the Management Committee in charge of IT at [JunHe LLP](#). He works in the firm's Beijing head office. He has seen firsthand the impact of the pandemic on the legal profession and strategies that helped get his firm through it all. As Hua explained, "Having a good IT system has been the lifeblood of our firm." The firm uses a combination of cloud- and web-based solutions to ensure that staff members can stay connected and have access to the tools they need to get their work done.

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WHY THE CLOUD?

When it comes to finding ways to maintain business continuity across the entire firm during a crisis, it is hard to find fault in a comprehensive cloud-based solution. No matter what type of work you handle for the firm, there are cloud-based tools to accommodate it. The cloud can positively impact every aspect of your firm's business, including:



Firm leaders

When leadership considers any proposed tech investment, their primary concern is often how it will improve the delivery of legal services to clients. Can it help to improve efficiency? Can it contribute to increased productivity and profitability? Can it help the firm meet or exceed clients' increasing demands? By enabling people at all levels of the firm with a comprehensive cloud-based solution, leaders can realize all of those benefits, among others.



Attorneys

Attorneys are evaluated primarily on their billed time. The faster they can get through tasks that consume non-billable time, the more

time they have to dedicate to client matters. For attorneys, having access to a solution that allows them to access current, accurate information about any aspect of a matter helps to streamline administrative tasks and maximize billable time.



Finance

Cloud-based solutions don't just cover tasks associated with handling client matters. Perhaps one of the greatest advantages of the cloud is that it can provide connectivity across the entire firm. There are comprehensive financial solutions designed specifically for law firms that allow finance professionals to track every facet of a firm's business from collections and accounts payable to time tracking and trust accounting—all delivered through a consistent and intuitive user experience.



IT

IT leaders' roles go far beyond addressing the day-to-day technology needs of the firm. They must constantly be looking forward—keeping an eye on where the firm is headed in terms of practice areas, office locations, firm growth, and other considerations. Running a firm's entire tech stack from a single, remotely accessible platform can make managing technology much easier, including troubleshooting, upgrades, and rollouts. In addition, the scalability of a cloud-based solution completely streamlines the process of managing the firm's tech stack.

THE CLOUD AND CLIENT EXPERIENCE

As much as a move to the cloud can help to improve and streamline internal operations and collaboration at a firm, there can be equal benefits for clients. The RightScale 2020 State of the Cloud report from Flexera stated that 98% of respondents across a wide

variety of industries use the cloud. With such broad adoption, it stands to reason that a majority of law firm clients are familiar with cloud capabilities like document sharing, client portals, and more. By implementing a cloud-based solution, firms can live up to their clients' expectations for professional services and further solidify key relationships. For law firms challenged by placing cloud opportunities into the proper context, looking at examples from client perspectives can help:



Corporate general counsel

General counsels and their outside attorneys work together on matters involving the company's most sensitive information. These matters frequently require in-depth conversations, but always require a secure and reliable method of sharing documents and information. Whether discussing compliance, labor and employment law, vendor contracts, litigation, or any other issue, these conversations and interactions can be streamlined to a great extent using cloud-based solutions.



Litigation client

There are a lot of moving parts in every litigation proceeding and specific processes that go with each of them. Many of those processes require input or other involvement from clients. Litigation strategy, testimony, pleadings, motions, and other items will need to be reviewed and approved at various points throughout the proceeding. The ability to securely exchange this type of information via the cloud and avoid in-person meetings can provide the type of transparency and efficiency clients appreciate in the midst of an already stressful situation.



Transactional client

There is a lot at stake in every transactional matter. No matter what type of transaction is involved, there are specific rules and procedures

that must be followed. The slightest mistake can completely derail the deal, making clear communication and sound execution absolutely essential. With the volume of proprietary documents that need to be prepared, reviewed, and executed in a given transaction, using a cloud-based solution to manage the document flow can help to ensure that they are executed in a timely manner and that the client's interests remain protected.

OTHER BENEFITS OF THE CLOUD

In addition to the advantages a move to the cloud has from the business continuity and client experience perspectives, there are many other benefits. From improving the security of sensitive firm and client data to streamlining the way people are able to work remotely, the cloud has the potential to positively impact law firms and their businesses on many levels:



Enhanced security

In the early stages of cloud computing, security was often a concern. Today's cloud solutions, however, offer much better security, and many are being integrated into organizations' cybersecurity plans. With the increasing reports of ransomware attacks on law firms, the security of the cloud offers a level of protection that firms need and clients demand.



Support and hardware costs

By decreasing the space needed to house servers on premises and the need for support that comes with them, firms can save considerable time and money using the cloud. In addition, firms can add new software, rollout updates, and troubleshoot issues more easily via the cloud compared to an on-premises network.



Scalability

Perhaps one of the most attractive benefits of a cloud-based solution is its scalability.

The move to the cloud does not need to happen all at once. Firms can prioritize their most important functions and choose which ones to move to the cloud first. The ability to take a more modular approach to building a cloud-based solution makes it much easier to budget, plan rollouts, and ensure full adoption.



Collaboration and communication

With information for all aspects of the firm's business on a single platform, all contributors to a matter have equal and immediate access to everything they need to keep the entire workflow moving. Whether you need to work on a shared document with other people on your litigation team, work with a client on document preparation and review, or connect with someone in accounting about a billing question, it can all be done via the cloud.

currently be performed remotely. Rank them red, yellow, and green to indicate how essential they are:



Red: Can't function without it

Yellow: Challenging, but manageable

Green: Nice to have, but not critical

It is important to involve a cross-functional team in this discussion to ensure that all departments have a voice and get the opportunity to have their solutions included in the assessment. As part of the assessment, look at how the work was being completed during COVID-19 and how those methods impacted the firm's business. Were there any challenges? How much easier would it have been if those functions had been cloud-enabled?

NOW IS THE TIME

Though it is impossible to say when the next occurrence will arise that creates such a serious disruption to a law firm's day-to-day operations, one thing is certain: Having a plan in place that ensures a seamless transition from being in the office to working from home will pay immeasurable dividends.

Recent research from Gartner, Inc. indicates that, by 2025, 80% of enterprises will migrate entirely away from on-premises data centers to some type of cloud-based solution. And forward-thinking law firms will almost certainly be among them. Whether as a way to protect business continuity in the event of a crisis or as part of a broader plan to change the way the firm functions, the benefits of the cloud to law firms are numerous and undeniable.

THE FIRST STEPS

With the extensive capabilities available via the cloud, it can be difficult to know where to start in the process of finding the right solution. While every firm's situation will be different, a good starting point might be to find the gaps in your current remote capabilities. What are the critical functions at the firm that cannot currently be performed remotely?

Consider the cornerstones of your practice discussed earlier, as well as all other functions deemed essential to the day-to-day operation of the firm. Make a list of the tasks that cannot

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