

# Techno-savvy law firm shares secrets for success

How do you explain the techno-savvy — the understanding of both technology and its business value — that some lawyers instinctively bring to their practices?

Maybe it's found in their upbringing. David Feld's entire family enjoyed computers, while Sonia Kalia introduced her family to computers when she was a teenager.

Today, "we're considered the technology firm," Feld says of Feld|Kalia Barristers & Solicitors, the real estate practice he and Kalia run. "We teach people how to use computers and gadgets on the side." They also effectively put bits and bytes to work in their business.

Clients see technology in use whenever they visit the office. Given the fast-paced nature of residential real estate law, where files only stay open 30 to 60 days, the pair feel they have no choice. "Technology is the most helpful tool we have," Kalia asserts.

"Transparency is the name of the game," Feld offers as an explanation of the firm's technology choices. He starts by explaining information on the firm's web site, pointing to the search feature on the home page that lets people find information quickly.

The home page also links to a web-based cost calculator. "It tells you to the penny what



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you will pay after taxes," Feld says.

Dedicated staff spend their time naming documents and saving them in the right place, while other employees send documents to clients as those documents arrive at the firm.

They don't tag documents. Instead, they adhere to a naming convention for all documents, which, as Feld admits, makes for long file names.

Neither partner likes fax machines, but the firm does have a fax number. "Faxes come in via e-mail as PDFs, and they're all OCR'd [Optical character recognition]," says Feld in a quick flurry of tech TLAs (three-letter acronyms).

But it's all they need to quickly find documents. "We search for documents when clients call us, and we usually find the right documents before the client is done speaking," Feld says, attributing this speed to the search tool in Windows Vista.

The firm discourages printing. Having faxes come and go as PDFs eliminates one cause of paper consumption. Also, every employee's desk boasts two monitors: one for reading documents and the other for preparing them. "You wouldn't know it's a law office," Feld quips. "There's no paper to be seen."

He admits to printing paper in order to complete transactions. Prior to that step, clients who visit the office join Feld and Kalia in the board room and view documents on the firm's MacBook Air.

Yes, Feld|Kalia is a dual-platform (Windows and Mac) firm. Kalia also accesses her office Windows computer from her home iMac using a virtual private network (VPN).

Feld mentions Windows-only software such as Terraview and LawyersDoneDeal to explain why the firm hasn't abandoned Windows. "It would be nice to switch to Mac," he muses. "It's less crashy, it's instant-on and there's the sexy factor, the image thing — it goes with the decor of the new office."

The firm had run its Windows software on Macs for a time (a fairly recent development), stopping that experiment only when hard disk space ran low. Feld mentions his recent purchase of several terabytes of new hard disks,

adding "we could get rid of all our PCs."

E-mail, the cornerstone of client communications, goes through the firm's four-year-old Microsoft Exchange server, which the couple plans to abandon in favour of a hosted service.

That service will see plenty of activity. "We use e-mail proactively," Feld explains, saying that it is the main way the firm stays in contact with clients, many of whom use Blackberrys.

"With most lawyers, agents call asking if they have reviewed status certificates," Feld continues. "They don't call us. When we do it, we send it out by e-mail. Clients, agents, banks, all the players in the game are connected by e-mail."

Since both partners trust the written word more than conversations, they follow up each phone conversation with e-mail to make sure the right message got across.

"It reduces the broken telephone effect," Kalia says. "Buyers nervously brandish their pens and notebooks when they visit us," Kalia continues. "David keeps an open e-mail message addressed to clients during meetings and adds any reminders right in the e-mail. We use bold and colour, so if they're in a rush, they can look at the bold words and know what they have to do." ■



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