

E-mail for Solo and Small-Firm Practitioners

By Jennifer Ellis

For many years, solo and small-firm attorneys were at a substantial disadvantage when it came to technology. An area of specific concern was the ability to sync e-mail, calendars, and contacts among all computers, phones, and tablets. In the past, the solution to this problem was to buy an expensive Microsoft Exchange Server and pay for all the support that comes with this kind of in-house equipment. Fortunately, things have changed, and solo and small-firm attorneys are on equal footing with larger firms when it comes to e-mail. In fact, there are two solutions from which to choose: Office 365 and Google Apps for Business.

The Nightmare of Not Syncing

Most people, especially attorneys, have a substantial amount of e-mail, contacts, and appointments to organize. If those items are not properly synced, appointments can be missed, e-mail lost, and contacts updated in one place but not in another. If you have a computer at home, another at work, a smartphone, and a tablet, you can have four different sets of information. In addition, without the proper setup you can't share calendars and contacts with other indi-

viduals in your office. This makes it extremely difficult for an assistant to know when to schedule appointments for you or add statutes of limitations to your daily calendar. Now, not only is the inability to sync an inconvenience, it can be a source of malpractice.

Many people work around the issue of syncing e-mail by using IMAP, but its functionality is not nearly as good as Microsoft Exchange, and IMAP does not allow for syncing of contacts and calendars. While I was setting up my own office, I used Outlook and IMAP for e-mail and synced my Outlook calendar and contacts with Google using a free sync program. This required me to set up multiple accounts, and I ended up with numerous copies of the same contacts. In other words, it was a nightmare.

The Solutions

Fortunately, it wasn't too long after I left my employer (where I had the convenience of the Exchange Server) that Office 365 and Google Business Apps became valid, cloud-based services I could use to resolve my syncing problems. Both work for iPhone, Android, Blackberry, and Windows phones. They also work on tablets and, of course, computers. They can be used with Outlook 2007, 2010, or 2013. They can also be used with both Macs and PCs. In addition, both

services provide access to web-based e-mail, contacts, and calendars and, depending on the circumstances, some sharing of contacts and calendars is possible as well.

Office 365

Microsoft Office 365 allows you to easily sync contacts, calendars, and e-mail across all devices. Directly from Microsoft, the price ranges from \$4–\$20 a month per user with 25 GB of space. In addition to offering e-mail, calendar, and contacts, various versions of Office 365 offer Lync (instant messaging), Sharepoint, and even cloud-based access to the entire Office 2010 suite. I assume that, in time, the Office 2010 suite will be replaced with Office 2013.

A Warning

Some hosting companies offer cloud-based exchange, but normally these services include a lesser amount of storage for a similar or higher cost. Be certain you get the most for your money by choosing the best provider for you. The 1–2 GB of space the majority of providers offer is not enough for most attorneys. I have also found the reliability of these services to be questionable. When I first switched to cloud-based exchange, I went with my web host provider and experienced constant outages. I have never had an outage with Microsoft.

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Add-On to VOIP

Some professional VOIP (Internet-based phone) providers offer Office 365 as an add-on. They, too, have a tendency to limit the amount of space, but this is often negotiable. The neat thing about using Office 365 with phone providers is that some offer a true phone and e-mail integration. This means when you get a voicemail message, it is sent to your e-mail. If you delete a voicemail message from your e-mail account, it is deleted from your phone. You can also compose e-mail, create or adjust calendar or contact entries, and more—all by calling your voicemail. These services vary by cost, but generally speaking, you can find an integrated service for a reasonable rate when you consider everything you will be getting. Comparison shop.

Google Business Apps

The second option for syncing is Google Business Apps. Google's service is \$5 a month or \$50 a year per user. As with Microsoft, Google offers 25 GB of space. In addition to providing syncing across all devices for e-mail, contacts, and calendars, Google also offers access to Google Docs, Google Drive, Google Video, and more. There is no additional cost for access to these other services.

If you want to use Google with Outlook on a PC, Google offers a free Sync app that will set it up for you. Some users have experienced problems using Google on a Mac—for example, it can be more difficult to set up and get it working properly—but the problems are slowly but surely being resolved.

Shared Contacts and Calendars

In addition to syncing your e-mail, contacts, and calendar, you can share your contacts and calendar with others in your office. This makes setting up appointments and sharing contact information much easier. Both Office 365 and Google have this ability. Recently, though, I discovered a problem with shared calendars and Office 365. Currently, Office 365 does not allow syncing of shared calendars to phones or tablets. So if you have a calendar you share throughout your office, you will not be able

to sync it to other devices. Google does not have this limitation.

A solution to the Office 365 limitation is to purchase an additional user account for calendar and contacts only. You can then share the calendar and contacts throughout your office and, in addition, set up this shared account to sync on each phone and tablet. The caveat is that your phone or tablet must be capable of using more than one exchange-based account at once. iPads and iPhones using iOS 4 or above and other current devices should have this capability.

Setup

In my experience, the biggest problems with either service come during setup rather than use. Once the services are set up, they tend to work well. My law firm has used Google Business Apps for a long time without difficulty. I have been using Office 365 for my consulting firm for approximately 18 months almost trouble free.

I have set up both Office 365 and Google Business Apps for numerous firms. During the period when Microsoft was still developing the system, I experienced a different problem every time I set up Office 365; my most recent experiences, however, have gone well.

I have found the Google Business Apps setup process to be easy as well. Issues with Google tend to come up when you want to combine a free, nonbranded Gmail account you were previously using with a new Gmail account. Google does not allow this. While you can easily export your old e-mails and put them into your new account, it isn't a seamless change.

Steps for Setup

(1) Domain Name

You need a domain name for both Office 365 and Google Business Apps. For example, my domain name is jlellis.net. If

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you don't already have a domain name, get one. A branded e-mail address is a powerful piece of marketing. Also, if you decide you don't like your Internet provider, you can easily switch. For those currently using a nonbranded e-mail address, you simply need to forward your old address to your new one. Encourage people to use your new address by putting a note in your signature line.

Choose a domain that relates to your law firm and keep it relatively short. Also, try to avoid dashes or underscores in your domain name. Your best bet is a ".com" or a ".net." You should use the same domain you use for your website. If you don't have a website, what are you waiting for? Get one. But I digress.

You can purchase a domain name on virtually any web host. Actually, you are renting it and will need to renew every time your rental is up. You can rent for up to 99 years. I recommend putting the domain on auto-renew; when your rental period is up, the registrar will automatically charge your credit card and renew your domain for the same period as before.

(2) Verification

Once you've set up your domain name, you need to prove to Microsoft or Google that you have the right to use it. This makes sense, since you don't want someone to be able to steal your domain name. Some domain registrars are more cooperative with this process than others. I won't claim that the average person will find the process easy. You can set up either service by yourself, but depending on your level of technological comfort, you might want help. Generally speaking, it takes me approximately 15 minutes to do the setup, depending on the web host, and up to 72 hours for the

Internet to recognize the change. Typically, though, I find the verification process can be completed, including the recognition of change, in less than an hour.

Both Google and Microsoft provide instructions, but if you're not familiar with working with domain names, you might find it difficult. Most hosts will help with the process. If you have a web designer, he or she should be able to help.

(3) Change Your MX Records

Domains can be thought of as being divided into two basic parts: website and e-mail. You can separate these two items and host your website in one place and your e-mail in another. For example, I host my website on Bluehost but my e-mail through Office 365. Again, both Google and Office provide instructions, but you may want to ask your web designer or web host for assistance to ensure that everything is set up properly.

(4) Caution! Your Website

It is crucial that you point the website portion of your domain name to the correct place. Microsoft requires you to point your entire domain name to Microsoft, and then you must point the website portion back to your web host. This is important, because if you don't make the proper adjustments, visitors to your website will encounter an error page. Whether you install Office 365 or Google Business Apps, follow the instructions to ensure that your website remains visible. Your web host may or may not be able to help you. Normally the changes must be made in the Office 365 or Google Business Apps account and not in the domain-name registrar account.

(5) Your Computer

Microsoft provides a download for setting up Office 365 on your computer. Simply select the download and follow the instructions. For a Mac, you will most likely need to manually set up the service. Microsoft provides instructions.

Google provides a sync app to set up Google Business Apps on your computer; simply download and install. Setting up Google Business Apps for a Mac is more complicated, but Google provides instructions.

(6) Your Phones and Tablets

You set up Office 365 and Google Business Apps on your phone or tablet the same way you set up any e-mail account on these devices. You will need your domain name, password, and server information. You can access this information from within Office 365 or Google Business Apps.

My Preference

Lately, I have had good experiences with Google Business Apps. The changes Google has made are impressive, and I like Google Apps, too. Still, I prefer Office 365. I like the web-based version of Exchange more than the web-based version of Google. Also, I am unaware of any VOIP systems that integrate with Google.

Conclusion

There is no reason for solo and small-firm attorneys not to have the same kind of access to e-mail, calendar, and contacts as anyone from the largest firm. Cloud-based options like Office 365 and Google Business Apps make it possible for anyone to inexpensively take advantage of the full power of these tools. ■



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