Time for a Tech Audit?

Performing a Technology Audit is a Proactive Way to Keep on Top of Your Technology

By Jeffrey S. Krause

When was the last time you inventoried and reviewed the efficiency of your office technology? Do you have a technology plan and budget in place? For many law offices, the answers to these questions are "never" and "no." These are common mistakes. After all, you don't really pay much attention to your technology when it's working. The problem is that all technology has a life expectancy and the closer you get to the end of a particular product's life, the more likely you are to experience an unexpected catastrophic failure. Replacing your technology after such a failure usually is much more time consuming and frustrating than replacing technology on a budgeted cycle. If technology is a frustrating issue for you or if keeping up with advancements has not been a top priority, then maybe it's time for a technology audit.

So how does one go about performing a tech audit? The first steps are actually quite easy. Make a list of all your workstations, servers, printers, fax machines, mobile devices, scanners, and the like. Next, visit each one of these devices and write down the specifications (manufacturer, model number,

etc.). For some devices, this is pretty easy. For others, like servers and workstations, you will need to look a little deeper, as there are quite a few technical specifications. For example, how much RAM (random-access memory) is there? What is the CPU (central processing unit) speed? What is the size of the hard drive and how much space is available? There is also a lot of information to gather related to software and applications you are using both on your server and your workstations. Be sure to note the versions and patch levels for all your software. Finally, check your records. When were these devices purchased? For most computer equipment, the expected useful life is somewhere between three and four years. Are you running any critical systems on borrowed time? If your server is three years old, do you have a plan in place to replace it within the next year? Is the warranty still in effect? What about an emergency plan if the server fails tomorrow?

If you are feeling overwhelmed at the prospect of a software inventory, there are free and almost-free tools that can help. One such free tool is Belarc Advisor (http://belarc.com). Belarc Advisor creates a profile of your computer including installed software, status of Microsoft hot fixes, and anti-virus status. Belarc's commercial products do the same for your full network as

well as monitor security threats and other management-level items.

Several items are easy to overlook during this process, such as backup. As technology goes, backup is boring and not very glamorous, but it is the type of thing that will save your practice. Is your backup working? When was the last time you tested it? What type of methodology (rotation, full, or incremental) are you using? It is crucial that these questions are answered, or critical data and hours of labor could potentially be lost. Another easily overlooked item is security. How secure is your data? If you have remote access, you have some security risk. What security do you have in place? Your firewall and anti-virus software must be capable of meeting the growing threats on the Internet.

The second phase of a tech audit is a little more difficult to do without help. In this phase, you have to ask yourself some tough questions. Are you using your technology in the best way possible? Is your staff properly trained on the technology it is supposed to be using? Is your workflow built around your technology, or are the two completely independent of one another? What technologies have you heard of or read about that are worth investigating? This can be difficult because you might not be familiar with better ways of doing things. How can you

> Audits will help identify potential issues that may become serious problems for your business if left unattended.

know whether a document management system would help you if you are not familiar with the concept?

The difficulty of analyzing things you don't know much about and then trying to plan a strategy around those things is where a consultant can help. Consultants can assist your firm with everything from Office 2010 training to choosing the right smart phone. Some consultants charge for everything, while others offer free initial consultations and recommendations. If you do some of the legwork and provide information about the software and hardware you have, some consultants will provide recommendations for improvements at no charge. Fee-based consulting services can include but not necessarily be limited to review of technology, interviewing staff, analyzing workflow and other processes, and compilation of a report with specific recommendations for everything from new software to a training plan and a roadmap for the next two years.

Now that you have gathered all this information or worked with a consultant to assess your current technology, how do you use this information? One purpose of a tech audit is to determine the status of your current technology and make appropriate updates and upgrades. This could mean new software or hardware, which should probably be your first priority. A second purpose is to determine where you can improve your use of technology, which might be addressed by new hardware or software or a training investment in the software you already have. Finally, a technology audit should address where you are going. If you have identified the need for replacing critical technology and you are not doing it immediately, you need to put a plan (and a budget) in place to make it happen to better your firm's work environment. A technology road map is critical for keeping your firm performing at the height of its potential.

Performing a technology audit is a proactive way to keep on top of your technology, and you should consider doing one or having one done yearly. Audits will help identify potential issues that may become serious problems for your business if left unattended. They also help provide future direction so that your technology decisions become less haphazard and more the result of careful planning. While they cannot foresee or eliminate every possible problem, technology audits can go a long way toward making things more predictable and allowing you time to work on what matters—your business. ■

Jeffrey S. Krause is an attorney and owner of Krause Practice Management, LLC, a technology consulting firm providing technology advice and service to law firms of all sizes. Krause Practice Management is a member of the Lawtopia Consulting Network. Mr. Krause is a certified consultant for more than a dozen legal technology products including case management, billing, document management, digital dictation, and scanning solutions. He can be reached at jeff@krausepm.com.