Sign In

Keyword Search

NAELA News Jul/Aug/Sept 2016

Practice Development/Practice Management Section
Update on Video Conference Technology for Elder Law Attorneys

By Tom Caffrey

Video conferencing technology is having a dramatic impact on how some elder law firms operate their practice.

Web-based video conferencing is changing how some elder law firms allocate limited time, expands how they deliver legal services, provides a more personal client experience, and, most importantly, makes a favorable impact on firm profitability. Visualize your firm's use of technology 10 years ago compared to what you use today and try to imagine how you will be using technology in five or 10 years. Is there any chance that online visual collaboration will not become a greater part of your firm's operations?

Early adopters, like Michael Amoruso, Esq., and Stephen Spano, CELA, CAP, highlighted below, are proving that, for certain activities, video technology makes them more efficient, more effective, and provides a competitive advantage. This article describes how they are using video conferencing for everyday tasks including client appointments (initial, design, signing, and other meetings), webinars, intra-office meetings, and study groups. Video works well for one-on-one meetings and for group meetings between any combination of staff, lawyers, clients, family members, and advisors.

Go All In or Don't Bother

Michael Amoruso, an elder law attorney in Rye Brook, N.Y., reports that the integration of video conferencing has "totally changed" his practice. Mike has digitized his traditional client engagement process. New clients are offered the option of meeting in person, by phone, or through an online conference. The choice is the client's to make. Compared to telephone conferences, online meetings using interactive video provide a more personal meeting experience. Even client meetings to review or sign documents are now possible through video conferencing. Mike's advice to those considering this technology is that it requires a commitment and you should "go all in, or don't bother."

Mike's system was provided by his phone system vendor. Premise-based technology, however, is increasingly being replaced with browser and cloud-

Do you have an article you'd like to have considered for publication? Here are [guidelines for submission.](#)

[Download a PDF of this issue](#).

[Table of Contents](#)

[NAELA News Archives](#)

based alternatives. Online meeting technology continues to mature, costs have dropped, and a growing percentage of your existing and future clients are comfortable with it. With a lowered up-front investment and elimination of traditional barriers for on-boarding video technology, the only thing holding your firm back could be your lack of attention in this area.

Use of video today is similar to the status of a law firm's use of scanning technology 10 years ago. At that time, a small number of firms had recently discovered the efficiencies and benefits of scanning. Now it is commonplace. The dream of a paperless office seemed to become a reality almost overnight. Just as the early adopters started reporting that scanning was well worth the effort, we are now learning of similar success with online meetings.

Anywhere You Are

Video conferences may be conducted from wherever you are. The greater the demand on your time or need for travel, the more appealing online meetings become. Michael's motivation stems from these same demands — a very busy practice, many speaking engagements, and a desire to spend more time with family by working from his local and vacation homes. Mike feels that gaining proficiency using video technology today better prepares him for operating at the highest level in the future.

Intra-Office Conferencing

The law firm of Marshall, Parker & Weber has set up intraoffice conferencing with great success. They operate a multi-office firm in central Pennsylvania and each location is equipped for intra-office conferencing. We first wrote about them four years ago in NAELA News.[1] Today, video conferencing has simply become an integral part of their operations. Benefits include the convenience of hosting the client in an office closer to where they live, while meeting with the best qualified lawyer and support staff who can be located in a more distant office. In the event of an unexpected scheduling conflict, the intra-office video conferencing allows easy, last-minute substitution of someone from any branch office, thus avoiding rescheduling or cancellation of the appointment.

Staff interaction between the offices is improved as well. The firm regularly conducts intra-office staff meetings employing the video link, which saves the considerable travel time that would otherwise be required. It is also convenient for staff members at multiple offices to meet at lunchtime using the video-enabled conference rooms. This makes for a more informed, unified, and cohesive team.

The Video Experience Is Personal

Another firm actively using video is Spano & Dawicki, in Saugus, Mass. If you know Stephen Spano, then you know he is an avid user of all things digital, especially if it has an Apple logo on it. Stephen became more involved with online video through teaching courses online. Some of the technology Stephen's firm utilizes includes Skype, Facetime, 60-inch Apple TV's, large screen iPads, integrated video-enabled VOIP telephones, Adobe Connect integrated with

Blackboard Collaborate, and Logitech HD cameras. Stephen employs video conferencing for document signing meetings and uses a variety of apps that support digital signatures. Spano and Dawicki have a large modern conference room that can be used for a number of purposes. They can host in-office seminars for 20 or more visitors and use that same space for staff training or for online CLE training.

Stephen finds that video meetings are far more effective compared to telephone conferences. Sometimes online connections create reunions when distant family members are reunited in a way that is more personal than speaking over the telephone. Video is simply a more personal experience.

Some unique issues can occur with online meetings. At times, an off-screen person may be heard coaching answers to the on-screen client and that has to be dealt with. Technical issues can occur if the remote computer has a relatively slow internet connection. To fix this, the firm will slow down the frames per second speed of their video output. This is all part of the learning curve and likely why Mike Amoruso recommends that you need to be totally committed.

Getting Started

To get started using video, it is advisable to spend time online getting educated. A software review site such as G2 Crowd (https://www.g2crowd.com/categories/web-conferencing and https://www.g2crowd.com/categories/web-conferencing#before-you-buy) offers a wealth of information. Once you are comfortable with the concepts and features, you can then target one or more initial opportunities. The key is to select an activity that can employ video and to get started.

There are consumer- and business-level products and web-based services. Skype and Google Hangouts are used more for individual meetings. Join.me, GoToMeeting, and Zoom are more business-oriented products. Give careful attention to matching your requirements to available features. One product may offer meeting recordings and another may not. Screen annotation tools will differ and ease of connection vs. quality of connection factors can determine your choice of product. For example, one reviewer insists on browser-ready meeting technology, i.e., requires no initial download. That same reviewer, however, goes on to state that the best user experience is provided by the product that does require a short initial download. I have used GoToMeeting and GoToAssist for years that require a short download and don't find it problematic. It is better to use whatever provides the highest quality online experience for your client.

Time should be budgeted to select, set up, and test your video-enabled solutions. Thought should be given to your visual setting that your clients will see once online. Your visitors will have an initial reaction to what they see, what Malcolm Gladwell in his book, Blink,[2] refers to as "rapid cognition." Therefore make the digital experience as visually appealing as it is when a new client is visiting your physical office. Script the experience online just as you would script

the process for each type of office meeting. For example, before an attorney arrives, support staff should spend time online with your client assuring that the connection is completed and that required information is ready.

Don't Let the Choices Overwhelm You

We are fortunate to live in a time of great technological change with an ever-increasing variety of new ways to solve old problems. Don't let all of the choices overwhelm you and prevent you from getting started. In the not-very-distant future, some of your future meetings should be coming soon to a screen near you. How far off this is in time will be up to you. Since you now know video conferencing is working for others, perhaps its time to get started now. Why not?

Citations

1 Tom Caffrey, Working on Your Business: How to Leverage the Use of Video Conferencing Technology, NAELA News, June/July 2012.

2 Malcolm Gladwell, Blink (2007).

About the Author

Tom Caffrey is President of Premier Software (http://premiersoftware.com). Since 1985, Premier Software has provided leading system solutions to law firms, helping firms use technology to become better organized, more efficient, and more effective in managing and growing their practice. You can contact Tom at tcaffrey@premiersoftware.com.

Home ┊ KnowledgeBase   Contact ┊ Sitemap