

Mobile, Remote and Wireless

Extending the Office



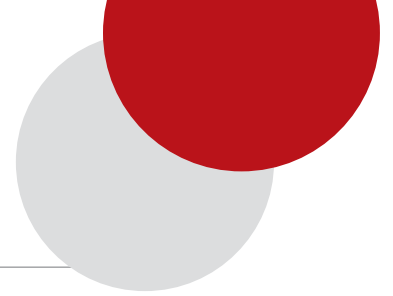
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Recent headlines have noted that RIM has enjoyed a huge marketing boost in that Barack Obama, in his pre-presidential days, refused to give up his BlackBerry. He reportedly said he could not function without it. The news is especially gratifying to RIM since it didn't pay Obama a dime to "endorse" their product (though it was estimated that his endorsement would be worth about \$50 million).

The idea that people become addicted to their BlackBerry and other smartphone devices is old news, of course, especially to those who work with lawyers. But the usual smartphone functionalities — e-mail, voice, voice mail, text — are not enough anymore. End users demand "always on" communications, and they also expect any and all smartphone communications to integrate seamlessly with the document management needs of their firms and law departments. Not only that, they're starting to require that their smartphones integrate with their landlines, both phone and fax lines.

Emerging technologies can accommodate these demands, but there can be hurdles to implementation. In this issue, we offer your information about these technologies and walk you through the challenges of implementation. We also help you determine which technologies are the best fit for your end users.

Our members drive the direction of this white paper; and Eric Anderson, Vice President of the Mobile, Remote and Wireless Peer Group, was an especially effective leader. Thanks to him and all of the contributors who brought this important and timely white paper to press.

Monica Williams
Managing Editor

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ABOUT ILTA

Providing technology solutions to law firms and legal departments gets more complex every day. Connecting with your peers to exchange ideas with those who have "been there, done that" has never been more valuable. For over three decades, the International Legal Technology Association has led the way in sharing knowledge and experience for those faced with challenges in their firms and legal departments. ILTA members come from entities of all sizes and all areas of practice, all sharing a common need to have access to the latest information about products and support services that impact the legal profession. ILTAnet.org

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STATEMENT OF PURPOSE

ILTA is the premier peer networking organization, providing information to members to maximize the value of technology in support of the legal profession.

The Growing Use of Unified Communications



A typical working day in an attorney's life may include one or two meetings at client sites, a practice group meeting at the office, a conference call with clients and practice group members who are spread across a large geographical area and perhaps a presentation across town for a professional organization. Then there are situations like the urgent business- or family-related emergency that require attorneys to leave the office for an extended period of time, or even the blizzard that just does not allow them to leave home.

As the business world becomes more dynamic and global, delivering services in a timely manner, as well as providing increased availability to clients and internal users, can position your firm ahead of the competition. Your firm must ensure clients that your attorneys are capable of providing and maintaining an excellent level of service in spite of their very busy and dynamic schedules. And that means you must provide your attorneys with all the tools they need to succeed as a mobile workforce.

Adopting a unified communications system (UCS) to provide telephone services, which can integrate with mobile devices, is critical to meeting that challenge. The growing popularity and use of smartphones such as a BlackBerry, and their easy integration with UCS allow the communication between client and attorneys to be more efficient. Services such as voice, e-mail, voice mail,

and faxing are consolidated into a single platform that can be delivered to the mobile device. Attorneys no longer have to be attached to an office to provide the services that their clients demand. In many cases, the use of a single smartphone could provide the only tool attorneys need to do business.

Mobility features also can be utilized to provide teams with a great collaboration tool for internal and external phone services, allowing the use of the firm's dial plan to reach anyone, regardless of physical location. Furthermore, unified mobility (UM) can be extended into your disaster recovery and business continuity plans by extending voice services to mobile devices, even if there are issues with your voice and data infrastructure. The advantages of extending VoIP services to mobile devices are growing along with business needs, and these unified voice and data services will play an essential role in the way attorneys conduct business.

SINGLE NUMBER REACH ENDS PHONE TAG

In many cases today, attorneys work with clients and practice groups that are spread across different cities, and as business globalization grows, attorneys are becoming more mobile. That mobility, and the need for attorneys to be highly available to meet clients' needs, are addressed by UCS through Single Number Reach (SNR). SNR gives your workforce the ability to receive calls, whether internal or external, through a single number that can simultaneously ring desk telephones, as well as mobile devices (usually feature-rich smartphones).



FROM IMAGINATION TO IMPLEMENTATION.

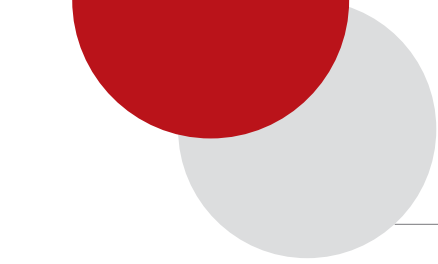
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Nexen Pruet has more than 170 attorneys in the Carolinas, and these attorneys are increasingly adopting Cisco Unified Mobility (a.k.a. Mobility Manager), which is integrated with the new Cisco Unified Communications Manager (CUCM), and the BlackBerry Enterprise Server (BES) infrastructure. Rusty Infinger, a member who practices exclusively in the area of worker's compensation defense, said he uses the mobility feature of Nexsen Pruet's UCS quite often. "My practice area takes me out of the office on a regular basis," says Infinger. "While using the BlackBerry for e-mail, and the cell phone for calls while away from my office, the unified mobility feature is another means that allows me to be available to my clients. Some clients do not like communicating via e-mail while others may get frustrated calling the office and then having to dial or look for your cell phone number. With this feature the client calls your office phone, and even if you're miles away from your office, you have the opportunity to take care of his or her concern immediately."

Infinger adds, "From a practical standpoint, this also helps me so that my voicemail inbox is not clogged with messages from folks who need me and get tired of playing phone tag. Also, it

helps me to deal with the issues immediately and not have to take steps backwards the next day when I'm back in the office dealing with those issues. While not as crucial, I miss a lot of calls just walking away from my desk to go to the scanner, water fountain, etc. Mobility Manager gives me the opportunity not to miss those calls when I'm in the office and momentarily away from my desk."

The mobility feature of Nexsen Pruet's phone system also helps attorneys balance their professional and personal lives. They can still provide superb services to clients without necessarily disrupting their personal routines. Kirsten E. Small is a special counsel at the firm's office in Greenville and focuses her practice in appellate law in state and federal courts. She says, "In my experience, clients find it very frustrating when they can't reach their lawyers and have to play phone tag. On the other hand, it can be frustrating to me to be tied to my desk when I am waiting for a client to call. With Mobility Manager, I can simply take my BlackBerry with me, whether I am going across the office or across town, and still take the call when it comes in."

As a working mother, Small appreciates how the tool helps her balance life and work. "If I want to spend some time with my kids or an emergency arises during working

hours, I can deal with client matters without having to go into the office for a call," she says. "I once took an urgent call from a client while I was with my family at Disney World. My husband took the kids on a ride while I handled the call. The client was extremely pleased with the level of service I provided, and my vacation hardly skipped a beat." Small adds, "In this day and age, clients increasingly expect 24/7 access to their attorneys, and attorneys must be proactive in protecting their privacy and personal time. Not having to give out my personal cell phone number to clients is a huge help in this regard."

SIMPLIFY COMMUNICATIONS THROUGH UNIFIED MESSAGING

SNR is also becoming an integral part of what is known today as unified communications. We all know that the legal industry, and most other industries in the business world, are increasingly relying on smartphones as their preferred communications tool. Among other features, these devices deliver real-time e-mail to

end users. By adopting the unified messaging feature of the UC architecture, voice messages are now delivered as e-mail messages. These are not only available through the mobile device, they also stay within the firm's system. This at first sounds

“Not having to give out my personal cell phone numbers to clients is a huge help.”

“cool,” as opposed to critical, for most users, until they realize what it means for their business to have the messages stay within the firm's data infrastructure. Now, not only do they have access to a consolidated voicemail inbox, but they can, in many cases, file those messages in the firm's document management system (DMS). They can do this not only from their e-mail client, but from their smartphone, eliminating the hassle of figuring out how to transfer a voice message left by a client on the mobile phone into the system so that it can be transcribed or filed. However, if the mobile user intentionally ignores the call by hitting “ignore,” “end” or any key on the phone, the message will be delivered to the mobile phone voice-mail account as opposed to the UM system. This should be prevented by providing appropriate training to your users.

While unified messaging is generally linked to e-mail/voice-mail integration, it also adds the ability of integrating faxes into its architecture. Faxing is often overlooked when considering ways to adopt a unified communications infrastructure; however, it is an integral way of doing business in the legal industry. For many of your attorneys, the ability to have faxes available on their mobile devices not only decreases response times in transactions or client interactions, it also improves internal processes and cost-savings by eliminating scanning jobs and dramatically reducing the amount of

paper used by fax machines. Receiving faxes through smartphones can speed up transactions or processes. The attorney can now securely forward a fax message to his or her staff for quick appropriate action, or even to clients and any party involved in a particular transaction. And again, faxes can now be filed easily into the DMS. It is also important to note that there isn't any extra administrative effort involved with backing up all of these messages (both faxes and voice messages). They are part of the regular e-mail system and DMS backup rotation.

HOW MOBILITY ENHANCES INTERNAL PROCESSES

At Nexsen Pruet, the IT department integrated the mobility capabilities of the VoIP phone system into the service desk on-call rotation. This integration allows for better and faster response times by providing internal users with SNR to the service desk. Furthermore, the unified messaging platform, along with the help desk system architecture, allows for multiple people to receive a message. This allows any team member to take action and work with the on-call technician to facilitate communication with end users. Load balancing can also be achieved for on-call rotation through Cisco Unified Mobility. Multiple technicians can be contacted when there are special projects or the need for high availability for after-hours support.

Mobility is not only a great tool to increase business productivity, it can also be integrated effectively into your business continuity and disaster recovery strategies. In the event that WAN connectivity or voice circuit becomes temporarily unavailable, attorneys who take advantage of SNR will always be available on their mobile phone if you plan accordingly and coordinate efforts with your telephony Internet service provider (TISP). Cisco Unified Communications Manager 6.x has also introduced the concept of call forward unregistered (CFUR). This feature is used when connectivity to your WAN is lost and the voice gateway or router at the branch office falls into survivable remote site telephony (SRST) mode. It provides telephony service to the end users during the outage by forwarding calls to the unregistered telephone from the central site via public switched telephone network (PSTN).

Recently, the router that provides both voice and WAN connectivity to Nexsen Pruet's Myrtle Beach office in South Carolina failed and had to be replaced. There was no WAN or voice connectivity during the outage. Nevertheless, everyone at the office was reachable via telephone, and they didn't even notice the voice outage. As part of the firm's disaster recovery and business continuity plan, the TISP automatically forwarded all direct inward dialing that came to every office through

one or multiple PRIs to a predetermined location, generally the corporate office or the data center that hosts the CUCM server controlling the remote office voice network. When calls for the remote office arrived at the Columbia office, all the receptionist had to do was conduct a regular four-digit, non-supervised transfer to the final recipient at the Myrtle Beach office. Then CFUR kicked in. The call was then forwarded to end users' mobile devices via PSTN by provisioning CUCM with the appropriate mobile numbers. No training or special instructions to the end users were needed, other than letting the Columbia receptionists know that they would be getting calls for the Myrtle Beach office due to network problems and that they should perform a regular nonsupervised transfer.

This feature was helpful and easy to set up because the number of users in the office was relatively small. Very little administrative effort was required to get all users set up in communications manager. This feature is more difficult to set up on the fly as the number of remote offices increases, since this mechanism is generally intended to reach remote extensions via PSTN while there is a WAN outage. This could be overcome with planning, however. This feature also could be implemented to reach only those who have the need for high availability, such as attorneys.

Let's say a blizzard affected your IT folks, and they had to stay at home for safety reasons. In this case, unified mobility would enable your service desk team to be available for the firm regardless of team members' locations. Moreover, the end users would not have to do anything different in order to access help when they needed it.

The features of unified communications are endless and growing to accommodate evolving business needs, Nexsen Pruet will be adopting Cisco Unified Presence in the future. Unified presence is another powerful collaboration tool that indicates the availability status of anyone within the firm. This feature can be extended to the BES infrastructure, and by using the presence client in the BlackBerry, attorneys can see the status of team members and communicate via click-to-call, instant messaging or e-mail. Furthermore, because of the integration with both Cisco Unified Communications Manager and Cisco Meeting Place Express, users could also initiate or join conference calls from their smartphone with a single click.

Providing tools that can help attorneys be more productive and available to clients, regardless of where the attorneys are, is a growing challenge for legal technology departments. The increasing adoption of smart mobile infrastructures such as BES can help by delivering applications and services such as e-mail. Integrating this platform with your phone system can further enhance attorney-client communications. The adoption of such integration can help your attorneys transition into the mobile workforce space while still providing superb services to clients. Extending voice services to mobile devices can also enhance internal communication and collaboration, and help your firm end the phone-tag game. **ILTA**

Providing Business Continuity Through Mobile Computing

A well known law firm in the United Kingdom recently announced the promotion of the firm's chief information officer to chief operating officer. Reportedly this promotion has caused the firm to focus more on information technology in order to provide a competitive edge within their business strategy.

This appointment isn't surprising. Increasingly firms are relying on technology to improve and simplify business processes. As the person responsible for the technology program within Freshfields Bruckhaus Deringer, a multinational law firm, I understand how the quest for technological innovation and improvement is a never-ending cycle.

Freshfields Bruckhaus Deringer has more than 2,400 lawyers working across 28 offices in 16 countries. The firm provides comprehensive worldwide service to national and multinational corporations, financial institutions and governments. Freshfields implemented BlackBerry devices a number of years ago to promote, enable and simplify remote working. When these devices were introduced, it significantly changed the way the lawyers at our firm worked. Once they had e-mail readily accessible, they began to see the need for further services to be provided on the BlackBerry devices, which resulted in a comprehensive programme of works.

The demand for BlackBerry devices has grown significantly since the initial deployment, and we currently have a user base of more than 3,000 throughout our 28 offices. Due to the performance limitations of our first BlackBerry devices, the usage at our firm has been predominantly restricted to e-mail, contacts and calendar.

Major improvements in mobile computing over the past year have provided us an opportunity to review and improve our mobility strategy by standardising our BlackBerry devices and extending functionality by deploying additional business-critical applications. We agreed on focusing improvements in several key areas.

Matter-centric filing of e-mail from Outlook to our Interwoven document management system (DMS) was recently introduced. It completely changed mail-management working practices throughout the firm, and we needed to provide this continuity on the BlackBerry. By providing access to our DMS from the

BlackBerry devices, we had to ensure that document rendering was comparable to the original document.

Since the loss of e-mail functionality during mail server outage can be disastrous, reducing the impact during times of mail outage was an absolute necessity.

Research suggests that between 19 to 21 percent of a mobile lawyer's time goes unrecorded and that law firms can improve billing revenue by 12 percent if accurate time recording is maintained. Therefore being able to capture time easily out of the office was an attractive option for us.

CREATING THE INFRASTRUCTURE

As reliance on the BlackBerry infrastructure grows, it becomes even more important to maintain high availability levels, and this requires a globally consistent, proactive and efficient supporting infrastructure.

To achieve this, we addressed the following specific initiatives:

- **Facilitating e-mail filing from the BlackBerry**

Our firm made a significant investment in Interwoven as our document management system. Interwoven's mobile product, WorkSite Mobile, provides read-only access to the DMS and enables the filing of e-mail messages from BlackBerry to workspaces. We decided to implement WorkSite as our preferred mobile DMS tool. Since its inception as BlackBerry Interwoven Integration Services three years ago, we have been involved with the product's testing and were fortunate to have an influence in its development. We intend to roll out WorkSite Mobile 8.3 P2 as it has proved to be very stable and is the first version to pass our rigorous testing.

When an e-mail message is filed in WorkSite Mobile, the user has the option of copying or moving the item to FileSite, and if the latter is selected, the item is deleted from the user's mailbox. WorkSite Mobile relies on the BlackBerry Enterprise Server (BES) to delete this e-mail. Before the "Hard Delete" functionality was introduced in BES 4.1.2, e-mail messages filed to workspaces were not removed from the BlackBerry. Although this was a welcome improvement, deletions of filed e-mail messages only truly worked once SP6 had been applied. We were running many variants of BlackBerry Enterprise Server globally, and in order to deploy this functionality, we would need to standardise and upgrade to BES 4.1.6.

We also needed to upgrade our BlackBerry models. We had eight different models of BlackBerry devices in circulation, and each of these would need to be standardised. A number of issues were identified with deploying the application to the BlackBerry over-the-air on devices running firmware prior to version 4.1.2. It was recommended that we upgrade all of our devices to firmware version 4.1 if we intended to use this method of deployment.

- **Improving attachment rendering on the BlackBerry**

Viewing large documents on the standard BlackBerry viewer can be frustrating as the formatting integrity of the document is not maintained. RepliGo significantly improves the rendering of attachments on the BlackBerry, and integrates very well with WorkSite Mobile, so it was an obvious choice to include this in our application suite.

- **Ensuring e-mail continuity during mail server outage**

MessageOne's E-Mail Continuity is agent-based and, once installed, has the ability to redirect e-mail from the messaging organisation to an external host when a mail server has failed. Provided the BES server is still functional, e-mail is delivered to the BlackBerry, and the user is unaffected by the mail server failure. Any messages sent from the BlackBerry are also directed to the external host until the failure has been resolved. The agent has a very small footprint on the BlackBerry, and the switchover during a failover is completely transparent to the user.

- **Enabling time recording on the BlackBerry**

We are in the process of evaluating Optimii's BlackBerry Time, a tool for capturing employee time and expenses; and, if successful, we intend to roll this out in 2009 to our lawyers. The product seems to be the most competitively priced out of all the products evaluated, and testing has been encouraging so far.

- **Defining and implementing global standards**

By implementing a global BlackBerry infrastructure standard, in terms of BES software version, security settings and BlackBerry model, we have ensured a consistent, supportable environment. BES 4.1.6 includes much-improved software distribution functionality, and it is highly recommended to reduce the troubleshooting time for related software distribution issues.

A number of offices issued mobile phones and BlackBerry devices to users, and it was not only annoying but also costly for users to have to carry around both devices. We found an answer to these issues in the



BlackBerry 8300 model, which provided a very stable platform. Consolidating these devices saved more than £2 million in our London office alone, and it resolved the over-the-air issues that were experienced with the older BlackBerry devices. O2, which offers products and tools for mobile solutions and mass BlackBerry deployments, provided a dedicated team that helped us in deployment to ensure a smooth transition.

- **Improving BlackBerry supporting infrastructure**

Improving BlackBerry functionality meant that our users would become even more reliant on the devices, and any downtime would therefore have a larger impact. Monitoring and troubleshooting BlackBerry-related issues can be very time-consuming due to the device's interaction with messaging areas. We had to find a solution that would proactively look for issues and potentially resolve them before they occurred.

Zenprise, a company that has received multiple awards from Microsoft for its work in this arena, was the obvious choice for us. The initial pilot of the Zenprise system highlighted almost 1,200 minor issues across our messaging organisation, which it then narrowed down to just over 98. Additionally, each issue was highlighted with a documented solution.

This tool will be provided to our service desk to significantly reduce time-to-fix for BlackBerry-related calls. A full review of our BlackBerry support processes will also be carried out to see where improvements can be made. A previous review enabled us to decrease the average time-to-fix from 24 to 2 hours.

This programme of works should take two years to complete; however, our work is not done. In the constant quest for improvement, we are already looking for a successor to the BlackBerry 8300; and, once we have identified it, this new mobile technology may enable further improvements. **ILTA**



Extending the Law Office with eDelaware

The custom BlackBerry application eDelaware was born in a brainstorming session at our firm, Potter Anderson. One of our partners, Scott E. Waxman, came up with some ideas for a mobile resource that would put information about Delaware law at the fingertips of mobile device users. While delivering a valuable service to users, this application would also help promote Potter Anderson as the go-to firm for Delaware law.

Waxman was adamant that the program should be developed with two specific requirements. First it should be free to everyone, whether they were co-counsel,

competing lawyers, in-house attorneys, clients or just individuals who had an interest in Delaware corporate law and alternative entity law. Second, recognizing that lawyers would not want to be bothered with manually updating the software to include the most recent laws and relevant judicial summaries, the program should be configured to update automatically.

The application concept quickly turned to reality when we began to write up the requirements, interview wireless application developers, establish a project plan and budget, and secure support from the firm's management committee for financing. The mobile application eDelaware v.1.0 was about to be born.

THE PROJECT SPECIFICATIONS

Our basic concept for eDelaware was an application that could “push” text files about Delaware law, including statutes and case summaries, to mobile devices. We intended to market this as a free service to subscribing members (primarily attorneys of other law firms and in-house counsel for Delaware corporations). To subscribe, users would visit our website, or some webpage to be determined, complete a short application to include name, title, business name and e-mail address. This same website would offer a link to download the BlackBerry code for eDelaware. We expected only a handful of users to sign up initially, but we thought this number would grow to more than 100 users in the first few months and as many as a thousand in a year.

On the back-end, we would stage statutes and case summaries in a database that kept track of a user’s device information and the specific eDelaware modules to which the user subscribed. Push-out timing needed to be determined but could be, for example, every day at 2:00 a.m. or perhaps once a week. During sign-up, users might also be asked to indicate how often they would want to receive new data and if they would like an e-mail notification to let them know when content has been updated.

We didn’t want users to have to scroll and select a topic and then wait for that data to load, hence the concept of the daily or weekly push at 2:00 a.m. The content would always be available to them in full offline, so it would be useful when traveling to meetings via train or plane or in any noncoverage area. At this point we estimated that there would be fewer than 100 text pages on the initial load, and that future updates might be 10 to 20 percent of that.

THE RESEARCH AND VENDOR SELECTION

We shared the concept with four development companies and quickly narrowed our options to two. The price between the two companies was close, but only one, Appforge, was able to write the application so that it would be supported across multiple platforms (using Crossfire technology) including Palm Symbian OS Windows Mobile and of course, BlackBerry. The cost for the added benefit of cross platform code was only about a 15 to 20 percent premium. We reviewed references, and they all came back with high accolades for AppForge. At that point, the vendor decision was made, and we signed into a confidentiality agreement with AppForge to begin development.

We also spent a considerable amount of time reviewing existing patents in detail to make sure we

weren’t stepping on any toes and to see if we might have something ourselves that was patentable. Trademark was also a consideration that needed to be reviewed.

THE DEVELOPMENT STAGE

The development work in different areas would include the following:

AT THE HANDHELD DEVICE

- Design user interface and data format for statutes and case summaries
- Set-up processes for data transfer and saving updated data
- Provide support for multiple device types, including trackwheels and trackballs
- Develop program for automatically scheduled data pull
- Create handheld application to read and display the data
- Develop PC database application to enter the data and format it correctly

AT THE BACK-END

- Design back-end database
- Set up registration process
- Create website where users can sign up for service and choose options
- Create system for posting data to server and generating e-mail messages

Map distribution of data

FOR CHANGE MANAGEMENT

- Manage change requests
- Track enhancements or modifications during design
- Address bug fixes and regression testing

REGARDING LEGAL MATTERS

- Create end-user license agreement (EULA)
- Manage EULA acknowledgements
- Draft and execute confidentiality agreements
- Obtain authority to refer to existing marks and brand names and ensure compliance with owner-specified criteria

AT TESTING PHASE

- Set up QA processes
- Conduct extensive testing

REGARDING MARKETING

- Create splash screen and icon design
- Draft FAQ for Web page
- Determine target audience and develop e-mail campaign
- Develop promotional pieces
- Design Web page graphics and modifications
- Generate news articles and coverage in various publications
- Plan team marketing initiatives with RIM and vendor

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In today's challenging market, it's critical to strike the right balance both to support your firm's attorneys and to keep your firm competitive. Not only will you get a chance to learn more about these technologies, but you'll speak directly to your peers via numerous networking opportunities that will allow you to compare approaches and ideas and gain valuable insights on how you can make a difference in the professional lives of your attorneys and in the bottom line of your shareholders.

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A SURPRISING TWIST

As the project proceeded, we had regular status calls and tracked the project via a spreadsheet. Everything was on target, but all of a sudden, the status calls stopped coming. We called and left voice messages asking to reschedule. No one returned our calls. Another day went by and a few more phone calls, and still there was no contact. Then, with a little Internet research, we found out why: AppForge had closed its doors and filed for bankruptcy right smack in the middle of our project. We were already 75 percent vested, and now we were up the proverbial creek without a paddle. We didn't have a copy of the source code that was completed to date, nor did we have any way to reach AppForge.

The next step took some work, but it panned out. We knew what state their offices were in, and we knew the first and last names of some members of the development team. I went on a mission to try and find a home phone number or address for anyone who was involved with the project and got lucky. I reached one of the developers who just happened to have a copy of the source code on his home computer. Our contract with AppForge stated that we were entitled to the source code, and a later court order confirmed the same. With a few more calls, we were able to obtain a copy of the original code.

We also found out that a local mobile development company by the name of CellAvant, Inc. had hired one of the former AppForge developers. Now we had to decide if we were going to abandon the project and cut our losses or try to move on. The decision wasn't easy, as moving on meant nearly doubling our budget and losing the cross-platform functionality that was AppForge's

hallmark. CellAvant didn't have the Crossfire technology and would have to code for the different mobile devices separately. Considering that BlackBerry usage is pervasive in the legal community, we opted to continue pursuit of the development and contracted with CellAvant to finish the project.

CellAvant did a fine job. They had a lawyer on staff who spoke our language and knew almost exactly what we were trying to accomplish. The developer hired from AppForge was already familiar with the project, so we didn't have to revisit project specs and start from scratch. A few months later and significantly over budget, eDelaware was launched. To date we have more than 500 registered users from more than 35 states and Canada.

Developed as a free resource by Potter Anderson, eDelaware provides instant access, via BlackBerry smartphones, to Delaware corporate and alternative entity statutes, Articles 8 and 9 of the UCC, as well as pertinent case summaries.

The application allows users to get the full text of certain statutes, as well as key case summaries from the Delaware Court of Chancery and the Supreme Court of Delaware as soon as they are available. All that is needed is a wireless connection to install eDelaware and to receive regular updates. Then users can access eDelaware's content with or without a wireless connection, anytime, anywhere. Updates are seamlessly downloaded to the user's BlackBerry smartphone. In the end, the project was a success. **ILTA**

The full text of Delaware General Corporation Law, Delaware Statutory Trust Act, Delaware Limited Liability Company Act, and other essential statutes can be downloaded and updated on users' BlackBerry smartphones within hours of new laws being enacted.

Visit www.potteranderson.com/eDelaware.html to learn more.

Emerging Trends in Mobility



Legal professionals are constantly looking for ways to become more reachable and more efficient. As attorneys have become more mobile, it has become increasingly challenging for them to stay connected to clients and colleagues. While many organization's e-mail and data capabilities are fully mobile, many still struggle with juggling multiple phone numbers, devices and voice-mail systems.

If desk phones and smartphones are not integrated, attorneys often must manage two phone numbers (a mobile number and an office number associated with a PBX) as well as two voice mailboxes and two phone directories. Managing multiple devices and voice-mail systems can actually lead to communication breakdowns that waste time and increase the risk of attorneys not returning calls in a timely manner. For clients and coworkers who often must dial multiple phone numbers to reach an attorney, these communication delays are an unnecessary frustration. Such complexity can also be costly and can present challenges with billing clients for time and resources. While mobile devices are crucial to doing business today, they can also be a cost sink if left open to any type of use.

Communication is just not as efficient with nonintegrated systems. But fixed mobile convergence (FMC) can help address some of the challenges attorneys have in staying connected to clients and colleagues. Integration between mobile phones, other landline phones and a company's PBX-based desk phones is one way of improving an attorney's "reachability." When using a smartphone alone, an attorney won't have access to PBX features or the ability to extend the identity of a desk phone. While they may have some capabilities on the mobile phone itself, such as conference calling, it is basically a stand-alone feature of the phone and does not tie into the enterprise network or do things like transfer calls, extension dial, or conference in multiple users leveraging the office PBX.

FMC promises to make enterprise voice capabilities as mobile as e-mail, and this is an important step in supporting a mobile or remote legal team. FMC provides the ability to transition the desktop phone into a pocket device that can go anywhere. Attorneys can be reached via a single phone number regardless of location, can manage a single corporate voice mailbox, and can access advanced PBX-based calling features, such as transfer, extension dialing, conferencing and park, from any mobile phone. Single-number reach provides attorneys with more privacy, since they do not have to give out their personal cell phone or home numbers in order to be reached when not

in the office. FMC also enables workers to transition live calls between their desk phone and mobile phones without disconnecting and having to re-establish the call.

In addition to increased productivity, one of the key benefits of single-number reach for legal firms is that it can help a firm maintain more control of its client base by requiring that only the main number be used to reach its attorneys, who quite often take clients with them when they leave the practice.

FMC can be delivered in a variety of ways, including the following:

- **PBX extension is a carrier-independent offering in which mobile phones can become extensions on the corporate PBX in a one-number identity, one-voice-mail mobility service. Not only are users reachable on their regular extension numbers, they can perform all the regular desk phone functions, such as four- or five-digit dialing to colleagues and conferencing capabilities. They also have the ability to transition a call from one phone to another, so a call answered on a desk phone can be transitioned to a smartphone or vice versa.**
- **Unlicensed Mobile Access (UMA) is a technology that enables the seamless handoff of calls between cellular networks and an organization's internal Wi-Fi network. For law firms using Wi-Fi, this can have cost advantages.**
- **IP Multimedia Subsystem (IMS) involves the implementation of an end-to-end IP network with all the necessary parts in its core to handle mobile traffic as fixed and charge for it accordingly. Mobile operators are migrating to next-generation networks and want to offer the convergence of fixed and mobile with fixed-line pricing wherever possible.**

Although it is important to acknowledge FMC market trends, PBX extension solutions address the key requirements for law firms regarding productivity, security and manageability. They also can leverage a law firm's existing PBX and deliver both a soft and hard ROI. Many organizations with highly mobile workforces have deployed this technology to help them be more productive, as well as give them better control over mobile devices in their company. Considering the level of security needed to protect confidential physical and electronic files, the mobile phone is often overlooked, and this can be a costly oversight. One thing that the telecommunications departments like about some PBX extension solutions is their ability to authenticate mobile

devices with their PBX to ensure that only authorized parties and mobile devices are able to make calls through the corporate phone system.

Some PBX extension solutions can allow users to toggle back and forth between their personal lines and business lines on their smartphones. Allowing attorneys to do this enables them to maintain both a personal identity and a work identity on one device. Inbound calls can have different ringtones based on the number being called so that an attorney will know if a call is business-related or personal and can respond appropriately.

Now what if a telecommunications department wants to lock down a device so that all calls go through the PBX? This is possible with some solutions. The benefits of this include providing another way to set parameters as to who can access the corporate telephony network and when. It also makes it possible to conduct call recording in case this is needed for auditing purposes.

Secure FMC technology enables legal firms to do the following:

- **Monitor and control mobile phones. Firms can even implement restrictions to limit calling with internal, national or international parameters.**
- **Ensure the enterprise PBX is being used appropriately.**
- **Gain more accurate estimations of telecom costs and overall productivity.**
- **Implement call recording rules to ensure proper compliance and authorization.**

Another way that FMC can help law firms is in facilitating proper billing. If a firm is using a PBX extension solution and the firm's mobile phone calls are going through the PBX, it is much easier at the end of the month for the firm to reconcile phone bills by client and provide more accurate and efficient billing.

Like any other business, law firms must look for ways to capitalize on every possible opportunity to grow their business, so adopting technologies that can help make legal teams more efficient are paramount. When a firm chooses to implement an FMC, the convenience of mobility doesn't have to equal a loss in productivity, revenue or record-keeping. By creating a unified voice communications strategy, in addition to adding wireless e-mail and applications, IT professionals enable attorneys and other key staff members to take their offices with them wherever they go. **ILTA**



The Wireless Road Less Traveled

There are many options available and decisions to be made when deploying personal digital assistants (PDAs), including which handheld devices to purchase and which carrier to choose for wireless service. Each option is probably worthy of its own discussion, but this article outlines our firm's experience with a third-party wireless provider. Our first-person account illustrates the unexpected things that can happen when you stray from the traditional group of big name wireless carriers.

Back in the summer of 2006, we decided to provide PDAs to attorneys who wanted them. We looked at both Good Mobile Messaging (GMM) and BlackBerry. The costs were about the same, but GMM and Windows Mobile-based PDAs offered us a better feature set. We also evaluated wireless carriers. Through some referrals, we got a quote from a third-party wireless provider, Coast to Coast Cellular (C2C for short). They offered the same coverage as Verizon, but at about a 15 to 18 percent discount.

Although we contracted through C2C, the service provider was actually Verizon. The phones had the Verizon logo; when we called to activate the phones, we got the "Welcome to Verizon" greeting; and the phones all worked in the Washington, D.C. Metro tunnels, for which Verizon is the only provider with service.

Our first indication of the true, behind-the-scenes difference in our third-party provider and Verizon came about one-and-a-half months after we rolled out the first batch of PDAs. One of

“We rolled along without any other incidents ... but unfortunately a reckoning came.”

the attorneys who had had his personal cell number ported over got a surprise bill from Verizon. It seems he exceeded his plan minutes. His personal Verizon plan still had his wife and children's phones on the plan, and their calls to him (and vice versa)

were considered by Verizon to be "out of network." Needless to say, he wasn't exactly thrilled. In helping him investigate this issue with both Verizon and our provider, we also learned that our firm's phone numbers did not show up anywhere in Verizon's billing system. This wasn't really a big surprise.

That was a relatively minor bump in the road, and we rolled along for well over a year without any other incidents. In fact, during this time we received great service from C2C. We

always talked and e-mailed directly with the same rep. After the first year, she called to say that she had been reviewing our usage and found that we never used the full combined minutes for all of our phones (450 minutes each). She asked us if we would like to change the plan, in mid-contract, to 400 minutes at a savings of about 11 percent. No contract extension was required. Another time, our rep called us, unprompted, and suggested we access detailed billing online, which helped us eliminate another unnecessary cost.

Unfortunately, a reckoning came one fine fall day when we received e-mail alerts from Good Mobile Messaging that we had 29 phones that were “unlicensed,” and our Good data service would stop working if we did not bring them into “compliance.” We either had to be on a data plan from an “authorized” carrier or pay Good directly for secure transport service (STS) licenses at \$240 per phone, per year. Nothing had changed since the beginning of our service — same phones, same provider, same data plan. Even Good’s management portal showed all our phones with Verizon as the carrier. And Good agreed that Verizon was an “authorized” carrier. Well, actually one thing had changed: Good had been purchased by Motorola. So we paid Good for the STS licenses.

About three months later, during a regular review of the statistics on the Good management portal, we noticed that our phones were showing as “licensed through carrier” and our paid STS licenses were sitting idle. Three weeks, eight e-mail messages and a half dozen phone calls later, Good agreed that we, in fact, did not need the STS licenses. After another flurry of e-mail messages and phone calls, they agreed to provide us a refund, but it might take one-to-two billing cycles for that to get processed through their billing department.

We called and e-mailed about once a month for the next four months and still, no refund. In the meantime, our contract with C2C was coming up for renewal and our users were clamoring for new devices. Although the STS licensing issue was technically “resolved,” it was made clear to our computer committee that it may not be permanent.

We did a comparison between Verizon and C2C, and C2C was the clear winner from both a cost and support standpoint. But once we factored in the STS licenses, Verizon was less expensive. The committee decided to stay with both C2C and Good for a variety of reasons with full awareness of the potential STS licensing cost issue. We moved forward with the C2C contract, testing and deploying new devices.

The calls and e-mail messages to Good continued, and we finally got our refund. Lo and behold, within one week of that refund, the warning e-mail messages from

Good began arriving again. Our PDAs would stop working on December 2. *Déjà vu.*

Since then, vendors have taken the following steps to address our situation:

- **Good customer care has provided us with six months of free STS licensing till things get worked out.**
- **A completely different department within Good/Motorola has contacted us. This is the department that deals directly with Verizon. They are providing us with a one-year STS licensing grant.**
- **C2C has offered us a revised data plan that would be authorized through Verizon/Good at a price that more than offsets the per phone cost. This was largely negotiated prior to signing the new contract.**

In reviewing our experience in choosing a third-party wireless service, I can relay the following advice:

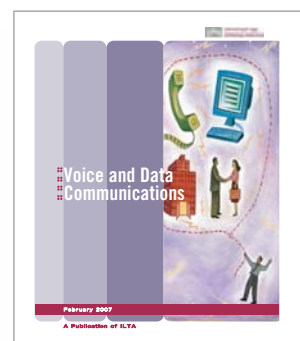
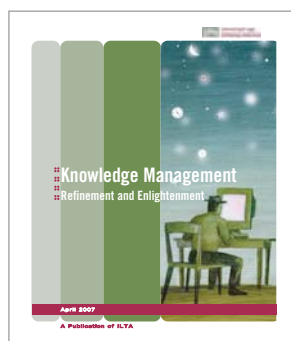
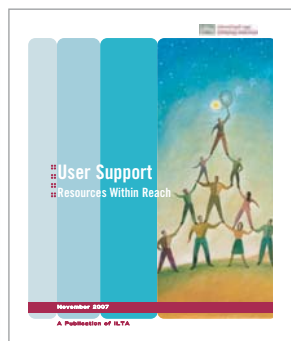
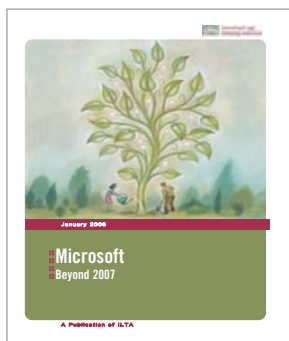
- **Make sure you understand the exact relationship between the vendor (e.g. Coast to Coast) and the carrier (e.g. Verizon). Some vendors are “agents” that just resell the phone and plan. Post-sales billing and support is handled by the carrier; other vendors resell the service and provide the billing and support.**
- **If the vendor is just an agent (post-sales billing and support by the carrier), than pricing and plan options are the key decision factors.**
- **If the vendor is a reseller or wholesaler (post-sales billing and support by the vendor, not the carrier) check references. Remember, you will typically not get support from the carrier. Also, compare all the contract options against the base carrier such as early termination fees, device replacement/upgrade options, surcharges or roaming charges.**

In hindsight, we’re not sure if we would take the same steps or make the same decisions, but the end result proved satisfactory. The most important lesson we learned from this experience is that we have to be every bit as diligent with a third-party wireless service as we would have had we stayed on the more-traveled road. **ILTA**

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