

Web Conferencing Services for the New Normal

By Richard Marx



Looking back, it seems like only yesterday. No, actually, it really does seem like ten or even 12 years ago. Back then, on average, I was working with about 15 law firms a year, traveling across four states in the Southwest to the tune of about 25,000 miles a year. I would show up at your office with a flight case full of laptops and big screens (a mobile training lab), set up in a conference room, roll up my sleeves, and train, then train some more, and then train some more. . . you get the idea. When I worked with you one-on-one, someone was always looking for a chair for me so we could try to sit side-by-side in front of your computer while we worked on your software. Then my software consulting business began to suffer from law firms not having a lot of money to spend on automating their office. I think we

called it a recession. Back then, I had only occasionally been using online software to Go To Your PC. (See what I did there? I can say no more.) But an idea had started brewing.

That idea was to go national. Go online. Go To Meet (see, I did it again) with 50 firms a year from the comfort of my home office. At that time, I could set up a conference call and do some screen sharing. You know, travel from Tucson to Tucumcari, Tehachapi to Tonopah . . . all before noon. Well, here I am telling my story so, yeah, it worked and still works. I have not been to a client's office in more than ten years, and, yes, they really do like it a whole lot better that way as well. They get to sit comfortably in front of their computer, wherever it just happens to be, and we spend quality time working on whatever is needed. Nobody's looking for an extra chair.

WHAT ARE WE GOING TO CALL THIS THING?

That was then and this is now. For some reason, there seems to be a lot of interest in meeting online. The title of this article refers to "web conferencing," but what does that really mean? It would be tempting to give you a nice spreadsheet of features and pricing by a bunch of different software companies. But you can do that online and probably will or already have. So, let's talk about what the software does, how it gets delivered, and how it can help you and your clients.

Some software lets you go *really fast!* Some software will rent you a room. One product lets you GoTo different places. Maybe you want to get in someone's Face for a given Time. Very clever ways to name things and even insert new language into our world. You know, just Zoom me.

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WE NEED TO TALK

We need to talk about how web conferencing is packaged. So, you need to know that you may need more than one product, or you may need one product that incorporates many different things that you need or are already doing with other software that you no longer need. Whoops, things just got complicated. Did I mention that all of this is changing almost weekly? The good news is that all this interest in meeting online is providing more attention to innovation and features at an accelerated pace. Let's start with some basics.

CAN YOU HEAR ME NOW?

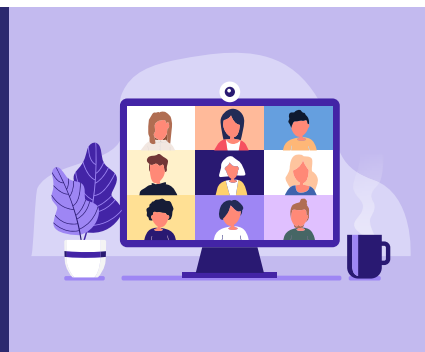
You will need to be able to hear the people you are meeting. Audio is by phone and/or using your computer's microphone and speakers or hopefully a good headset. You should insist that both methods are available. You should consider using a headset so you can hear and be heard clearly. The person you are inviting should know that they will also need a good headset or should call in and use their phone. Typically, a desktop or laptop with a built-in mic and speakers just doesn't cut it anymore. Also, you could have one or more attendees who are in a noisy environment. It is more than just a little annoy . . . woof, woof, bark, arf, woof, arf . . . so sorry, it's "bring your dogs to work day" . . . actually, every day . . . where was I? Yes, it is annoying when someone gives you their hold music and then goes away. If you plan on meeting with more than one person at a time, you will need to be able to mute mics as needed. Put it on your features list.

There is online software that does not have audio. It is usually used by people like me or IT techies to access a computer and do things to them (to the computers, not the people). A couple of features found here are the ability to log in to a computer unassisted and the ability to transfer files. Hmm, so you could hook up with your clients and help them upload the documents you need directly to your document management system? Not a bad idea.

A laptop with a built-in mic and speakers just doesn't cut it anymore.

home . . . so, come on, make the bed. Camera placement can help you appear to be looking at the people on your session. All the rest is just common sense. Assume your video is always on and you can probably save face.

So, you want to have a staff meeting with 20 people in your firm. There can be some limitation as to how many attendees can join a session. This is often marketed to get you to purchase a more expensive plan. Some software is strictly one-on-one



OUR NEW VOYEURISM

My wife (and business partner) has a new pastime in noticing the room decor when viewing a videoconference. Hey, these days it could be for business or watching your favorite late-night TV host. Your hardware is once again important. You may find that the camera in your phone, tablet, or laptop can be adequate. A good webcam can also be a great investment for your desktop, and it should come with a built-in mic that can greatly improve the audio quality if you are not using a headset.

There are lots of subtleties here when using video. You should get things set up and then have someone else sit in front of the camera and you join them . . . you know, practice a little. Are you making a good impression or not? And remember, you're working from

within your organization, and others may vary from allowing four to 250 participants.

Want to get fancy with all this? There are programs that let you pick a virtual background so you can make us think you are at the beach or, uh umm, maybe really at the office.

DO YOU PLAY NICE WITH OTHERS?

In the past, I have written for this publication about the growing importance of integrating software programs and our desire to do more things on devices other than our computers ("You Don't Want Practice Management Software—You Want a Practice Management Software Platform," *GPSolo*, January 2018 (35:1); "Law Office Technology Prognostication for 2017," *GPSolo* January 2017 (34:1)).

Let's put both of these concepts in the mix here.

I have found some programs that have better apps for my iPad than my desktop. Then there is the app that is so wonderful until you download it and try to use it on your phone. And, of course, everyone wants to do everything on their phone . . . me, too! These apps are often designed around the limitations of your device(s). If

you are sending an invitation. Is there a simple "click here and away we go" ease to it, or does the invitation scare even you? Just sayin'. What about integration with your practice management program? You can schedule an event in your management software and have it included as a web conference meeting—with the right practice management and web conferencing software, that is. Pretty neat, huh?

start, or schedule a video meeting. Oh, and it can even have a virtual assistant to determine how my phones are answered.

I think this is what you would call a feature-rich environment. And this thing is called unified communications as a service (UCaaS). Just a fancy way of saying a cloud-based communication platform. It is not the VoIP phone system your parents had. Because it's in the cloud, I can access a wide range of applications from my iPad, phone, and PC; in many cases, having all these features is no more expensive than just purchasing a phone service. You may not want or need all these features, but, in my not-so-humble opinion, bundling is still probably your best option.



The prognosticator in me says this "new norm" is not going away.

you are going to use them on a particular device, then you had better try them out on that particular device during your free trial. You also must understand that the people you are inviting to your meeting may also be on a device that simply just does not play well with what you are using. I recently had a client on a Macintosh computer that could not get through the settings needed to make our session work. Luckily, I had another program that did everything in a Google browser. Having choices can be nice . . . problem solved.

Now, you may need to schedule meetings. So, are you using Outlook? Can your conferencing program let you schedule that appointment using your default e-mail program? Again, turn this around and assess what the invite looks like to the people to whom

BUNDLE AND SAVE

What does web conferencing software have in common with auto insurance and your TV and Internet providers? Nothing. Well, let's put different things that you need into one thing and sell you that. I have a screen that I pull up on my computer that has all these little symbols that I can click on to call you, transfer calls, log calls to my practice management program, e-mail you, text you, collaborate with the rest of my office, check my voice mail, check my calendar, fax you, and what was that last thing . . . join,

IT'S NOT GOING AWAY

Nearly overnight, your prospects and clients have developed a new perspective and expectation in how business should be conducted with your firm. We embraced this new way of doing business nearly a decade ago, and it has allowed us to help so many more clients efficiently and affordably . . . and, yes, confession, sometimes in PJs. The prognosticator in me says this "new norm" is not going away. My local Home Depot has curbside pickup, and I don't ever want *that* to change. And it looks like my favorite Mexican restaurant is going to make it! ■



Richard Marx (info@mmeonline.net) owns and operates MME Consulting Services, LLC (awesomedatabases.com), which has been helping clients create awesome databases since the new millennium. MME's focus is to recognize that our clients are the experts in their businesses and we are experts at helping them manage those businesses. Marx is an Advanced Certified Partner for PCLaw | Time Matters, Gold Certified Consultant for Clio, and Certified Implementation Specialist for Zola Suite.