



## TELECOMMUTING AND THE PERFECT HOME OFFICE

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Let me begin writing this article by officially coming out of the closet. I am a telecommuter, and not ashamed to admit it any more. For a very long time, those of us who were telecommuters hid the fact like a dirty secret. We were looked down upon by those of you who show up freshly scrubbed and buzzing on caffeine at some ungodly early hour of each weekday.

The general attitude was that the rank and file of telecommuters consisted of misfits who would not survive in a regular work environment, or those who were more interested in “dabbling” in work than actually getting down to it. But now that has changed.

Telecommuters today are represented by people at all levels of the law firm hierarchy; partners, secretaries, associates, managers and paralegals. Telecommuting comes in many arrangements. Usually there is some combination of in-office and home-office hours. Flexibility is a necessity. I have had calls on the Pennsylvania Bar Association Hot Line from various law firm employees looking for assistance on the technology to enable this alternate work arrangement. Without a doubt, my most interesting call was from a partner who desired the ability to work on his small houseboat out on the ocean for a month at a time in summer, just as productively as if he were at the office. Just a few years ago this would have been hardly feasible. Now, the answer is “No problem!” Today’s technology capably supports telecommuting.

I’ve learned a lot in the years I’ve been telecommuting, and in talking to others who do the same. Here are some points to consider to make your experience successful, or to even determine if you should try it.

### **LOCATION, LOCATION, LOCATION**

Just like in real estate, where you locate your home office is important. You need some privacy, especially if there are children in the home. If you have urgent work to do, your procrastination propensity will consistently win out if there are multiple distractions too easily available. Confidentiality is important, too, so the area in which you work should be some place which can be left with work exposed, without worrying about inadvertent disclosure, cluttering up family living space or having children mistake your court motion for coloring paper.

## UTILITIES

You will need adequate electrical outlets. Install them before you set up the office, and put a good quality surge suppressor (with an on/off switch) in each, installed high enough on the wall to reach without crawling under your desk. I recommend at least one outlet be a dedicated circuit. Use that one for your computer equipment, or at least the CPU. On that outlet you should use a good quality UPS (uninterruptible power supply) in place of the surge suppressor, and plug your CPU into it. A lot of computer problems are power related. Don't scrimp here or you may pay the price with a failed hard drive or other failed essential components.

You will need good lighting. Nothing is more tiring or depressing than working in a dimly lit room. Keep glare in mind as you select and position overhead lighting. And speaking of glare, while having the luxury of a real window in a home office (e.g. not being relegated to the basement) may seem wonderful, keep its location in mind when positioning your desk and computer. To me, a sunny window is more a deficit than a luxury. If I want sunshine I walk outside in the yard with my dogs for a five minute break.

## TELEPHONE AND VOICEMAIL

You need to be able to "walk away" from the office, and you can't do that if you don't know whether the ringing phone has a business or personal call. Nor can your family members ever "relax" when answering the phone. This was very evident recently when I referred a personal friend to an attorney. The friend called back to say I must have provided a wrong number, because the number reached a home answering machine, not a lawyer's office. I contacted the attorney to confirm that the number was correct. I discovered his home office did not have a separate phone line or voice mail, and his answering machine message was more personal than professional. I got back to my friend the next day, but she had quickly selected another attorney. She expressed that she felt uncomfortable using what appeared to be a "less than professional" attorney.

For messages when you're out, consider using your local telephone vendor's voice mail service. It's more private than a machine, more reliable, secure from children who inadvertently erase messages, and easily accessible from anywhere. And most importantly, the recording you make will appear more business-like and professional to callers. Plus, unlike with an answering machine, you can choose which messages to save, and which to delete. If you can, set up your vmail account to beep a pager or forward to your cell phone. That's a real advantage if you spend a lot of time on the road. Try to have only one mailbox for all your calls, whether cell, car, or office. Having to check multiple mailboxes is just asking for something to get overlooked.

You wouldn't consider scrimping on letterhead or business cards; don't consider doing it with your telephone system and voice mail. It definitely reflects on you. Spend the money to get a second line. If available in your area, get a broad-band DSL connection, which will provide you with both a regular telephone (POTS) circuit and a high speed



modem connection all on the one line. If you mostly fax from your computer, you won't need an additional line for faxing, as all incoming faxes can be directed right to your computer and printed on your laser printer. If you anticipate frequently faxing items which you can't send directly from your computer, you will need an additional POTS line for faxing. If you frequently make conference calls involving more than one party, you could spend more money on additional lines and multi-line telephones, but it's usually easier and cheaper to pay as you go with a conference call service.

Treat yourself to a decent digital portable telephone with a headset. (The higher the MHz the greater the range between handset or headset and base unit, but I find that some MHz frequency bands are easily interfered with by fluorescent lighting, and other wireless devices. So buy a telephone and headset from a reliable source so you can return either if you are not happy with the fidelity. Do not throw away the packaging until you've had a chance to test it out for several days.) I can have a mobile hands-free conversation anywhere within one floor of my base unit, using only the headset. My former unit allowed this but I also had to have a small phone transmitter clipped to my waistband. My clients never realize if I am walking about or sometimes enjoying my garden as we discuss their needs. The distances from the base unit and clarity of conversation have improved dramatically. I can make and receive calls almost anywhere in my home or garden. My favorite "source" has become Hello Direct ([www.hellodirect.com](http://www.hellodirect.com)), but the local Radio Shack has some great options as well.

### **COPIER/FAX/SCANNER/PRINTER**

You can't operate an office without a copier. I suggest a good digital multi-function machine which serves as a high-speed printer, scanner, fax, and copier all in one. Usually there's some minor functionality sacrifice made when you combine all the functions into one unit, but the savings in footprint (desk area needed) and service contract and supply costs more than balance the trade. For example, I use my Konica BizHub 7218 as a fax and copier, and only occasionally as a scanner. Although it will also serve as a high speed printer and scanner, I already had two high volume laser printers and a fast, reliable scanner in service when I leased the Konica. The model been extremely reliable. My previous model, the Konica 7415, had only 2 jams in 3 years, and copy quality was as crisp at the end of the lease as when I first got it. My 7218 is faster, particularly on start-up from "sleep" mode, and for the first copy out. That's made a noticeable difference in my productivity. The automatic feeder (ADF) has not yet misfed, and the ADF is always the Achilles heel of faxes and copiers. My functional sacrifice on the first model I had was collating. So on the rare instance that I had a large copy job which required multiple sets, I took it to the local Kinko's. My current model has full collating functionality.

### **SNAIL MAIL/EXPRESS MAIL/EMAIL**

If you do mailings larger than a few sheets on a regular basis, stamps will prove too slow and costly. You will need a decent 5 or 10 pound electronic scale, and either a small electronic postage meter, or an internet-based postage service like e-stamp.com or



stamps.com. So far, feedback from your peers regarding internet-based postage services has been mixed. For that reason, I recommend good quality scale, and either visiting the United States Postal Service to print your postage labels via on-line purchase, or a meter which can be refilled over the phone.

For convenience, you can set up an account with Federal Express, UPS, or a similar express mail carrier. They will supply you with free preprinted shipping labels, envelopes, an 800 number to call for pick-up at your home office, and automatically put the charges on your credit card. Sweet and hassle free.

Finally, if you're going to routinely use your email account to send documents back and forth to others, you'll need to pick an ISP other than AOL. AOL is really a "personal-use" ISP. They are inappropriate for office use because they handle attachments so poorly. To find the ISPs which service your area go to <http://thelist.internet.com/areacode.html>. If there are several good choices, pick the ISP which enables you to obtain the best email address for yourself. Having an email address like [mx4356@isp-service.com](mailto:mx4356@isp-service.com) doesn't do much to make you sound professional. On the other hand, [yourname@isp-service.com](mailto:yourname@isp-service.com) looks much better.

## COMPUTER EQUIPMENT

If you telecommute only part of the time, it will impact your technology decisions. Chances are you'll want a high quality laptop and docking station. Then you can take your documents with you simply by unplugging the laptop. When you return to the main office you can plug the laptop back in and resynchronize your data. At your home office you can likely get away with a port replicator, a decent sized (17+ inch flat panel) monitor and good printer or multi-function device. The difference between a docking station and port replicator is that in addition to providing a plug-in for peripherals like keyboard, mouse and monitor, the docking station also maintains the network connection and power supply. Not all manufacturers offer a choice. Some sell only one or the other. So if you wind up with a port replicator, I always advise you buy one or two additional power cords, so that you can avoid having to bend down to plug and unplug it at either office, and always have one in your laptop bag for travel. This is one item attorneys tend to forget frequently on road trips, and then they become frustrated to learn the battery life on the laptop is no where as long as they thought.

If you are a full time home office worker like me, your needs will be different. Splurge on a really good monitor. You should seriously consider an oversized high-definition flat panel monitor, as it will not only save precious desk space, it will provide amazing clarity. If the price makes you sweat, get yourself at least a 17" monitor. But nowadays, this is the norm, so to truly treat yourself, price out the 21" or 22" model. Years ago I splurged on a 21" monitor when most people were using 13" monitors. I have used it with each generation of computer I have owned – more than I care to admit – and gotten more than my money's worth from it. More important, it has enabled me to work very long hours without the typical eye fatigue computer work often brings.



If you will have more than one computer, now is the time to consider a wireless peer-to-peer network set-up. It will enable you to take your laptop just about anywhere in your home or garden with the ability to access shared resources like printer, documents, scanner, high speed modem line, and so forth. You might also consider a wireless mouse and keyboard for your desktop or port replicator, as you can move about a lot more easily and comfortably without being tethered to cords.

## SOFTWARE

There will never be a better product for heads-down document production than WordPerfect 5.1-DOS. Many of us still grieve its loss, but it's time to get over it and move on. The legal industry has been the last to react, but it is slowly, misgivingly, migrating to Word. Most new law firm installations are Word.

Law firm corporate clients have been using Word for years. Now that documents are being emailed back and forth, it matters whether or not you have the same software as your clients. A fax didn't care what software you used. Email attachments do. Consider being ambidextrous. You should keep—and know how to use—a copy of WordPerfect “just in case”, but it's time to make Word your primary word processing software. I've provided computer training for many law firms as they transitioned from WordPerfect (DOS or Windows) to Word, and all are happily and productively using Word. I've also been hired by firms long after they made a transition without training. Productivity and morale dropped sharply. There was also regrettably increased staff turnover as a result of frustration in trying to get work out under pressure with software which seemed to “do whatever it wanted.” So be sure to invest in good training when you make the transition. This software is just too complicated to use without professional training; unless you want your staff and attorneys using their computers like electric typewriters, that is.

Depending on your case load, you probably need case management software. This product has matured beautifully in recent years. There are a multitude of packages to select from; there is surely one which will fit the way you think and organize your practice. At technology seminars I present for the Pennsylvania Bar Association, I show attorneys how to “do the math” when evaluating the real cost of this software investment. I point out that if it enables you to bill just 15 minutes more each day—something which I virtually guarantee it will—at a billing rate of \$160/hour, that comes to \$40/day, \$200/week, about \$900/month, for a whopping \$10,800 more profit per lawyer per year! The software pays for itself in the first few months. Who wouldn't want to do this?

Without case management, you should learn and use personal productivity software such as Microsoft Office or Corel's Groupwise. It will enable you to manage your calendar, email, rolodex, to-do list (tasks), and synchronize them with a Personal Digital Assistant (PDA) like a Palm or Treo, for additional efficiency on your part. And effectively managing calendar and task items is a must for malpractice avoidance and happy clients.



Many attorneys benefit by using document management or document assembly software. I personally am hooked on Copernic's desktop search engine. And of course there are software packages for every conceivable type of law.

Automating your general ledger and client billing is a "no brainer" nowadays. There are very inexpensive and easy-to-use packages which can save you tremendous time and effort, not to mention accounting fees. You can cut a check for a client cost, and have it post automatically to the client's account, so when you generate a bill, it's on there. You can post client checks and have it automatically generate the deposit slip for you, and post it to the correct general ledger account. I am amazed when I hear from attorneys who are doing these functions manually. They waste huge chunks of time which would otherwise be billable or spent on marketing. My personal recommendation is to buy integrated software which provides case management, time & billing and accounting all in one package. This will eliminate any duplication of effort on your part, and increase accuracy.

Most software packages enable one to have multiple companies. For example, I set up my personal records as well as business records in QuickBooks using two separate entity names. When you work from a home office there are often expenses you pay personally which your accountant may decide are better paid by the firm, or vice versa. I simply send my information to her electronically, we discuss changes over the telephone while we BOTH review the data, and she makes the necessary adjustments for accounting/tax purposes, and emails back the corrections. I maximize my deductions while I minimize my accounting fees. Sweet!

## RECORDS MANAGEMENT

When you work in a home office environment, space is very limited. Therefore, it is critically important to have a records management policy in place, and to inform your clients about it in your engagement agreement. You will probably need to use a record archive service which provides pick-up and delivery, or a self-storage unit close to home. If you use a self-storage unit, make sure their security procedures are adequate.

## MEETINGS WITH CLIENTS

When you work from a home office, meeting with clients or vendors can be problematic. Most homes don't have room for a conference area, and you may not want clients or vendors visiting your home. Depending on who your clients are, they may not have facilities for meeting either. Explore whether a local hotel has a small meeting room you can rent at a reasonable rate. Perhaps there is an executive suite in your area where you can rent a conference room on an as-needed basis. Or you may be able to make an arrangement with a non-competitive law firm close by, or even your local bar association.



## SUMMARY

This is by no means an exhaustive look at all the things to consider when setting up a home office. But it includes most of the major issues. Spend your money in areas which will give you the tools to compete with your larger competitors. Don't scrimp and risk sounding or looking like a "fly by night" practitioner. Don't work in a perpetually uncomfortable and unsupportive environment. Being an attorney nowadays is tough enough; give yourself the tools to make it as effortless and efficient as possible. Remember, you need to work smarter, not harder.

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