



Taking your Practice Home

Tips to Digitally Transform Your Law Practice Quickly & Easily

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Prepare to Work Remotely



Prepare to Work Remotely

- Business Process First – Technology Second
 - Create a list of services provided
 - Identify how you used to provide those services
 - Identify the gaps
 - Find the technology to fill the gaps

WFH Assessment Checklist

√=HAVE

N=NEED

X=DON'T NEED

	Laptop	Laptop Charger	Phone	WFRM Access	Lifesize Access	R: Drive Access	CW Access	Teams Access	IT Glue Access	Home Internet	Dual Monitors
AJ	√	√	√	√	√	√	√	√	√	√	√
Alex	√	√	√	√	√	√	√	√	√	√	√
Anthony	√	√	√	√	√	√	√	√	√	√	N
Arefeen	N	N	√	√	√	√	√	√	√	√	N
Ari											



Prepare to Work Remotely

- Executing The Plan
 - Convert to Digital Processes
 - Documents
 - Meetings (Client & Internal)
 - Communications
 - Making payments
 - Receiving payments
 - Pick the Right Technologies
 - VPN vs. Remote Desktop vs. 3rd Party (LogMeIn, GoToMy PC, etc.)
 - Personal vs. Work Computers
 - One Screen or Multiple Screens
 - Laptop vs. Desktop



Microsoft Office 365



About Office 365



Microsoft Office 365 Overview

- Office 365 is a subscription service from Microsoft that provides users with productivity applications for use in both large and small organizations.
- The industry is trending to Office 365 for email over the typical Exchange Server (on-premises version of Microsoft's email solution) for ease of deployment, long term management, and consumers' demand for cloud services.



Microsoft Office 365 Use Applications

- In addition to hosted email, Office 365 offers SharePoint Online, which allows for collaboration beyond email and OneDrive.
- SharePoint Online can be used as a substitute or supplement an on-premises file server, depending on organization size and structure.
- Whittlesey has multiple clients setup with this approach with great success.
- Using Office 365 hosted services is a great alternative for smaller organizations who may not desire the upfront and ongoing costs to maintain a physical server.
- Whether limited to working from home or when you're back in your offices, Office 365 will be a great addition to your organization.



What if I already use Office 365?

- In many instances, Office 365 is deployed to replace an on-premises Microsoft Exchange Server or as the go-to solution for new organizations requiring email functionality.
- Often times there are Office 365 features that simply were not configured at the time of deployment.
- You may already have the proper licensing for use of other Office 365 services – they may just need to be configured!



How can I move to Office 365?

- There are several tools available to afford successful migrations, (both large and small) to Office 365.
- Every scenario is different. Be sure to consult with your IT department or IT support provider to discuss the specifics for your organization.
- Microsoft is currently offering Office 365 free for 6 months to new subscribers.

Office 365 Editions

- There are several versions of Office 365 available to fit your business needs
- Be sure to discuss your licensing needs with your IT department or IT support vendor to make sure your licensing selection is not too little or not enough services.

Office 365 Business	Office 365 Business Premium	Office 365 Business Essentials	Office 365 ProPlus	Office 365 E1	Office 365 E3	Office 365 E5
\$8.25 user/month (annual commitment)	\$12.50 user/month (annual commitment)	\$5.00 user/month (annual commitment)	\$12.00 user/month (annual commitment)	\$8.00 user/month (annual commitment)	\$20.00 user/month (annual commitment)	\$35.00 user/month (annual commitment)
Buy now	Buy now <small>Try free for 1 month¹</small>	Buy now	Buy now Learn more >	Buy now Learn more >	Buy now Try for free > Learn more >	Buy now Try for free > Contact sales > Learn more >
<small>Best for businesses that need Office apps plus cloud file storage and sharing. Business email not included.</small>	<small>Best for businesses that need business email, Office apps, and other business services.</small>	<small>Best for businesses that need business email and other business services. Office apps not included.</small>	<small>Office applications plus cloud file storage and sharing. Business email not included.</small>	<small>Business services—email, file storage and sharing, Office Online, meetings and IM, and more. Office applications not included.</small>	<small>All the features of ProPlus and Office 365 E1 plus security and compliance tools, such as legal hold, data loss prevention, and more.</small>	<small>All the features of Office 365 E3 plus advanced security, analytics, and voice capabilities.</small>
Office apps included Outlook Word Excel PowerPoint Access (PC only)	Office apps included Outlook Word Excel PowerPoint Access (PC only)	Office apps included (Not included) ¹	Office applications included Outlook Word Excel PowerPoint Access (PC only) Publisher (PC only)	Office applications included (Not included)	Office applications included Outlook Word Excel PowerPoint Access (PC only) Publisher (PC only)	Office applications included Outlook Word Excel PowerPoint Access (PC only) Publisher (PC only)
Services included OneDrive	Services included Exchange OneDrive SharePoint Teams	Services included Exchange OneDrive SharePoint Teams	Services included OneDrive	Services included Exchange OneDrive SharePoint Teams Yammer Stream	Services included Exchange OneDrive SharePoint Teams Yammer Stream	Services included Exchange OneDrive SharePoint Teams Yammer Stream Power BI



Video Conferencing Solutions



Video Conferencing Solutions

- Microsoft Teams – great for internal use, great security in place.
 - HIPAA compliance already in place, covered by Office 365 umbrella.
 - Encryption of video conferencing
- Zoom, WebEx, etc. – great for webinars and external use





Office 365 Resources

- [Microsoft statement on offering Office 365 free for 6 months](#)
- [Office 365 business subscriptions](#)
- [Microsoft Teams overview](#)
- [Office 365 HIPAA compliance information](#)
- [Office 365 data protection information](#)



Security Concerns with Remote Access



Security Concerns with Remote Access

- **Don't Do**
 - Simple passwords and open RDP
- Data Security
 - PII & PHI – Keep track of it
 - Email Encryption
 - Data Loss Prevention (DLP)
- Access Security
 - Password Management
 - Multi-Factor Authentication
- Cloud vs. On Premise
 - Is one more secure than the other?
 - Is now the time to make a change?
- Knowledge is Power
 - Educate yourself, staff and clients about extra cyber risk



Security and Working Remotely



Security and Working Remotely

- Compliance concerns while working remotely
 - Importance of having a Written Information Security Plan (WISP)
 - Can also guide you in setting requirements for a remote scenario
- Testing your applications before they are needed
 - Annually perform a DR test to ensure your plan works
 - Document results and adjust plan to meet required expectations
- Protecting client data - (Sensitive, Confidential, PII)
 - How to share data with external clients – secure portals
 - Encryption
- Importance of selecting applications & services ahead of time
 - Select remote solutions that is both reliable and provides ease of access for end-users
- Continue to practice good security hygiene
 - Don't connect to public Wi-Fi
 - Continue to protect your passwords



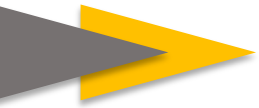
WISP – What Is It?

- Written Information Security Program contains the following:
 - Incident Response Plan
 - Business Continuity Plan (BCP)
 - Disaster Recovery Plan (DR)
 - User Acceptance Policy
 - Vendor Management Program
 - Security Awareness Program
 - Designating one or more employees to maintain the program (such as a Privacy Officer)
 - Performing an annual review and sign-off by Privacy Officer



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CLE Code

- 502794



Questions?

Bonus Material!

WAdvising.com/cyberCBA



- For participants only
- Office 365 Best Practices Checklist
- WISP templates for reference that will help you better protect your business!



Thank you!

If you have any questions or would like to discuss your environment further, please feel free to reach out to Whittlesey Technology!



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