

TECHNOLOGY UPDATE

Collaborative Technologies and Software for Trust and Estate Practitioners

By Joseph G. Hodges, Jr., Esq.

I ncreasingly, as many of us move toward the cloud for our storage and communications needs, interest in collaborative technologies and software has significantly increased. These are technologies that solos and small firms can use—both within their offices for attorney collaboration on a project and remotely with their clients. Larger firms can leverage the very same technologies both firm wide and across multiple offices, let alone remotely with their clients. These technologies include cloud storage and retrieval, applications, project management and communications. The focus here will be on communications.

Interest in this subject is even more significant now that the Real Property, Probate & Trust Law Section of the American Bar Association (ABA) has its Communications Committee Technology Subcommittee working on a review and assessment of these technologies and software for purposes of making recommendations to the Communications Committee and the Section Leadership for the use of such technologies in various Section activities in the future. For purposes of this project, the technologies that will be examined will include conferencing (voice, video and data), calendaring, messaging, meetings and application sharing.

Mr. Hodges is an attorney in Denver, Colorado, and formerly served as Co-Chair of the American Bar Association's Real Property, Probate and Trust Law Section Technology Committee. He currently serves as a member of that Section's Communications Committee and the Technology in the Practice Committee of The American College of Trust and Estate Counsel.

I will attempt here to examine five of these leading technologies, those being **Skype**, **Google Hangouts**, **Meetings.io**, **WebEx Meetings**, and **Go-ToMeeting**. Each of these will be examined from a variety of perspectives, and criteria including the number of allowed users, if scheduling is integrated, the ease of connecting, whether it is landline compatible, controls and privacy, screen sharing, file sharing, simultaneous chat, and, of course, cost.

Skype (<http://www.skype.com/en>) is a very popular collaboration tool that first gained a significant foothold in the technology marketplace by providing a way for individuals to carry on family conversations over long distance lines for free. Since then it has grown into a full featured collaboration tool that merits serious consideration. Its key features today include calling (free if Skype-to-Skype, else at very affordable rates), video for face-to-face conversations, messaging (instant and voice and texting), and sharing (videos and files). You can do a video conference call with up to 10 people and a group call with up to 25 people. All you need in order to get started is a webcam, an internet connection and a computer or mobile device with a microphone and speakers or a headset, plus a broadband connection or WiFi. When considering this option, you should compare their regular account plan vs. their premium account plan as well as their Skype Credit vs. subscription payment plans. Skype satisfies most of the criteria I mentioned earlier, except it lacks integrated scheduling and good privacy controls.

Google Hangouts

Google Hangouts (<http://www.google.com/hangouts>) is a product of Google+. It is a simple browser plugin that is free and installs in seconds, so there is no need to download a separate application. Hangouts lets you bring conversations to life with photos, email, and even group video calls, all for free. You can connect with friends across computers, and Android and Apple devices, including iPhones, iPads, and iPod Touch Pads. Currently the user limit is 10, un-

Increasingly, as many of us move toward the cloud for our storage and communications needs, interest in collaborative technologies and software has significantly increased.

less you are using the broadcast version known as Hangouts On Air. Not only can you go back and pick up on a past conversation, but you can scroll through past Hangouts to re-live what you previously talked about. The video feature allows you to turn group conversations into live face-to-face calls. Those of you who use Google's Gmail can use Hangouts right from within Gmail or upgrade to Hangouts. All each user needs in order to use Hangouts is a web browser, a webcam, and a microphone. You can join a hangout without a webcam or microphone, but your experience will be more limited. When exploring this option, you need to decide if it is better for your needs to use the original Hangouts or the new Google+ Hangouts. Google Hangouts satisfies all of the criteria I mentioned earlier.

Meetings.io

Meetings.io (<https://meetings.io>), which became owned by Jive Software (the number one social business platform) in November of 2012, is truly designed as a clean and uncluttered video conferencing software program, but it is limited to up to

five people at a time so that everyone can see everyone else on their screens at the same time. Essentially this program permits people to meet face to face with anyone from around the world simply by using a Web browser. No complex software installations are needed, no sign ups are required with Meetings.io, and no social networks need to be joined. Those meetings could be with clients, customers, co-workers, or a project team—and it is all done without the participants leaving their desks. Starting a meeting is as simple as creating a meeting room link and giving it a name and then

sharing that link with those who are to be invited to attend. The meeting room can be reused as many times as needed and people can drop in and out of a given meeting at will because no sign ups or user registrations are required. You can share your computer screen with the group at any time. A personal notepad is built into each meeting room so each participant can take their own private notes during a meeting, and you can send messages and text chats to those attending. You can even share and play videos from YouTube, Vimeo, and Dailymotion. You can also share documents and files. As a registered user, all of your meetings are stored and managed for you. Should it be necessary, mobile calls, landline calls, and international destination calls can be made from within the meeting room. Meetings.io satisfies most of the criteria I mentioned earlier except ease of connecting and their FAQs reveal several problems with incompatibility with MACs Retina Displays and certain versions of Google Chrome's version of Flash.

sharing that link with those who are to be invited to attend. The meeting room can be reused as many times as needed and people can drop in and out of a given meeting at will because no sign ups or user registrations are required. You can share your computer screen with the group at any time. A personal notepad is built into each meeting room so each participant can take their own private notes during a meeting, and you can send messages and text chats to those attending. You can even share and play videos from YouTube, Vimeo, and Dailymotion. You can also share documents and files. As a registered user, all of your meetings are stored and managed for you. Should it be necessary, mobile calls, landline calls, and international destination calls can be made from within the meeting room. Meetings.io satisfies most of the criteria I mentioned earlier except ease of connecting and their FAQs reveal several problems with incompatibility with MACs Retina Displays and certain versions of Google Chrome's version of Flash.

WebEx Meetings

WebEx Meetings (www.webex.com) by Cisco comes in four flavors, Basic (which is free), and Premium 8, 25, and 100, all of which are fee based on a per-host per-month basis that ranges from \$24 to \$89 per month (\$10 per month annual up to \$69 per month annual). With Basic you can have one host and three people per meeting with standard quality video and 250MB of recording

CCH DRAFT

storage. With Premium 8 you can have one host and eight people per meeting with high definition video and 1 GB of recording storage. With Premium 25 you get up to nine hosts and 25 people per meeting with high definition video and 1 GB of recording storage. With Premium 100 you get up to nine hosts and 100 people per meeting with high definition video and 1 GB of recording storage. There is also an Enterprise edition that is designed for large organizations or large-scale meetings that allows up to 500 participants, but you have to contact WebEx for the details. As for a comparison of the features of these four basic offerings, there is an excellent chart comparison on the WebEx Web site under the Premium Account tab. According to that Chart, the three Premium versions share the same features in common, whereas the Basic version does not provide Phone Call-in, Call me/Toll-free, shared Applications, Remote Control, iPad Sharing, or Live 24/7 Support. Otherwise the Basic version does include VoIP Internet, shared Desktops, Documents and White Boards, and Tech Support by way of User Guides, Help Articles and FAQs. WebEx satisfies all of the criteria I mentioned earlier with the only limitation being that the free Basic version with only three users allowed is pretty limiting and likely would necessitate purchase of one of the Premium versions in order to make effective use of this particular collaborative tool.

GoToMeeting

GoToMeeting (<https://www1.gotomeeting.com>) by Citrix provides a 30-day free trial before their pay plan kicks in, which is \$49 per month per organization seat or \$468 annually (a 20 -percent savings). This price included unlimited meetings with up to 25 attendees, integrated calling service, including VoIP capacity, industry-leading security, unlimited software and service upgrades, and high-definition video conferencing. If more than five organizer accounts and additional management features are needed, or additional options such as toll-free and standalone audio conferencing are desired, you should explore a GoTo-

Meeting Corporate account. This product allows face-to-face interactions with remote customers, prospects and co-workers with the ability to hold on-the-fly or scheduled presentations, to provide live demos, and to collaborate on documents and CAD drawings in real time. Starting a meeting is as simple as using the GoToMeeting icon on your system tray and an e-mail or instant message, as there are no complicated logins or setups, and it takes just two minutes to set up and a few seconds to start a meeting. You can meet as often as you want for as long as you want, all for the one low monthly fee. GoToMeeting is described by some as the simplest and most cost effective online meeting solution on the market today. Participants in a meeting do not have to be registered with GoToMeeting and can attend the meetings for free. The coordinator has the option of scheduling meetings either through the GoToMeeting Web site, via Microsoft's Outlook or through instant messaging applications such as e-mail programs. Even a novice can begin organizing on the fly and scheduling meetings with absolutely no training and can either start a meeting immediately or schedule it for a later time. Some of this product's highlighted features and benefits are: high-definition video conferencing; desktop and keyboard and mouse viewing and sharing; chatting with participants, support for MAC and PC; desktop recording and meeting playback; and drawing tools. GoToMeeting satisfies all of the criteria I mentioned earlier.

The one thing I came away with from preparing my review of these five collaboration tools is that it would be best to try each one separately using the free or lowest cost version of each so you can decide which product best suits your specific needs, functionality requirements, and budget before settling on your collaboration product of choice. I say this because the cost of such trials is so reasonable with these particular products and all of them tout how easy it is to set up and run their product. Thus, you should test each one with some minimal size test groups and be sure to also obtain and consider evaluations of the products used from the meeting participants.