

60 HOT TECH AND PRACTICE MANAGEMENT TIPS IN 60 MINUTES FOR SOLOS AND SMALL FIRMS

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Review Expert Reports Remotely

- Citrix “Go To Meeting”
- www.gotomeeting.com
- \$49 per month (30 day free trial period)
- Expert witness sets up the meeting, hands the screen & controls off to you (and other attorneys, even in remote offices), and you “review” the report. No email discovery during the report evaluation.

MS Outlook #1

- ⦿ How many emails in your Inbox?
 - 10; 100; 1,000; 10,000; more
- ⦿ Organize your client's emails with client folders
 - Drag & Drop emails when tasks are “done”
 - Inbox should only be items “to be done” or reminders
 - Don't print out every email for a hardcopy
 - “Think Green”
- Goal: “Zero Inbox”
 - Deal with it when you open it

Adobe Acrobat 8 Tip #1

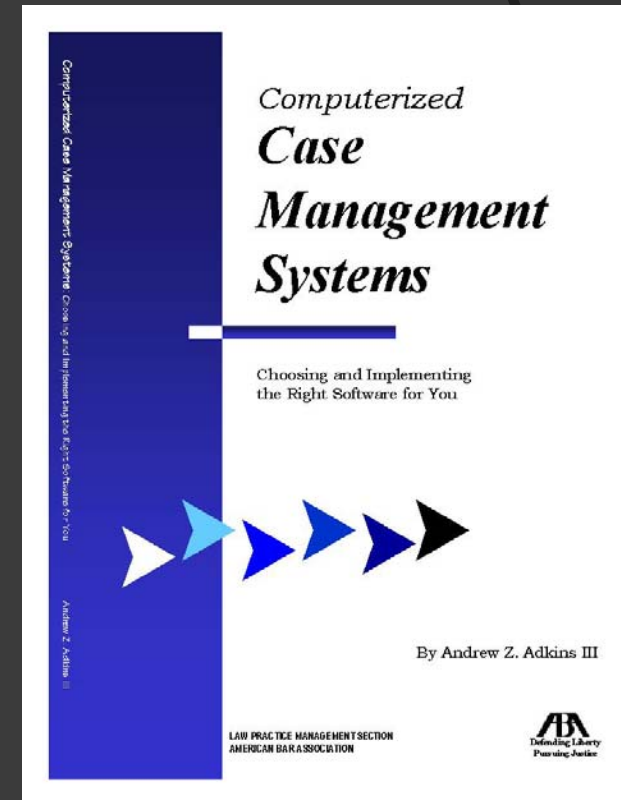
- ◎ Do you know security features of Adobe Acrobat?
 - Password protection for PDF documents
 - Set user controls so that a reader of the document can't revise, save, print or even copy text out of your PDF file

MS Word Tip #1

- Microsoft offers a free download to convert Word 2007 documents to Word 2003 format.
 - Microsoft Office Compatibility Pack for Word, Excel, and PowerPoint 2007 File Formats
 - FileFormatConverters.exe

Case Management (Solos & Small Firms)

- TimeMatters \$300
- Amicus Attorney \$699
- AbacusLaw \$900
- Practice Master \$500
- Needles (PI) \$1,000



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Practice Management Front Office/Back Office Combos (Solos & Small Firms)

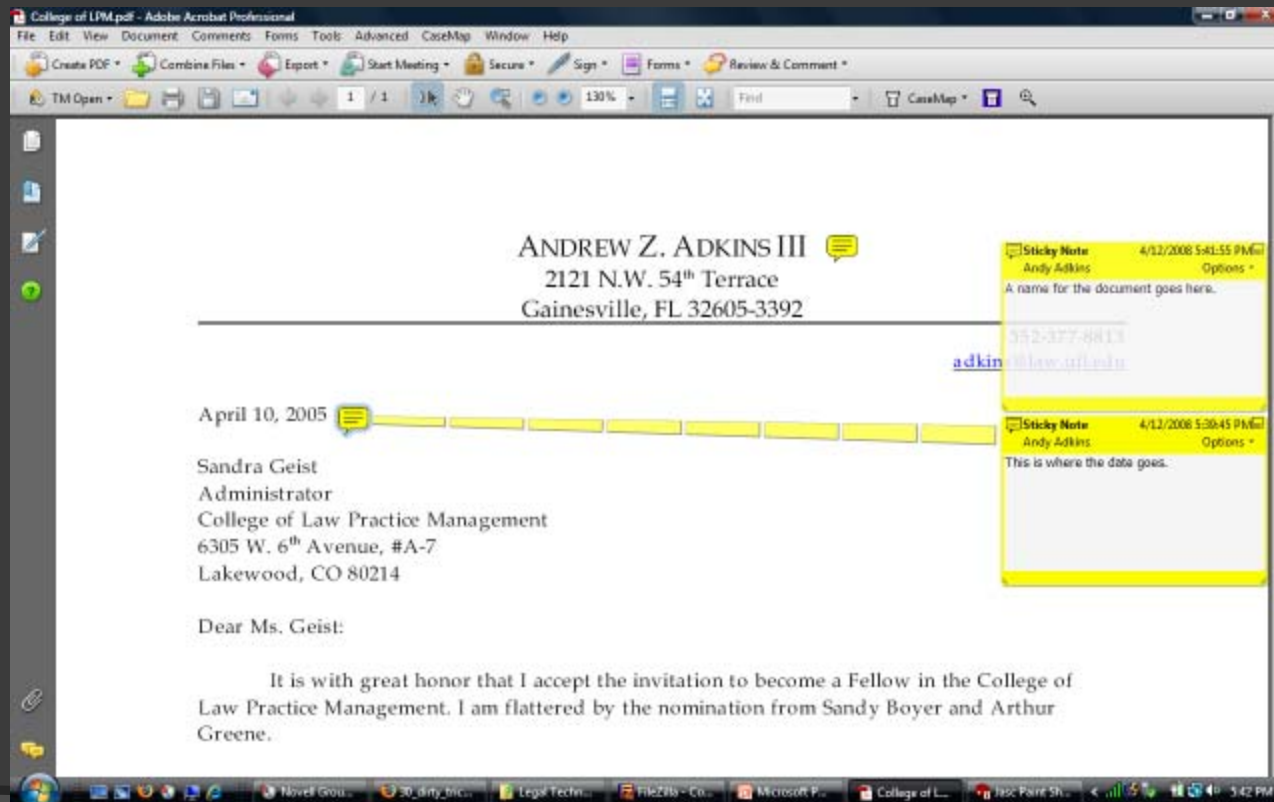
- AbacusLaw – PC Law (Lexis)
- Amicus Attorney – PC Law (Lexis)
- Perfect Law - (All in one)
- Practice Master – TABS 3
- ProLaw - (All in one)
- TimeMatters – PC Law, Juris (Lexis)

Backup Best Practices

- ◎ LTI recommends the following backup strategy:
 - Daily full backups (not incremental)
 - At least two weeks backup rotation, label tapes Monday, Tuesday..., Friday
 - Store backups offsite
 - Store & keep one backup per month off site

Adobe Acrobat 8 Tip #2

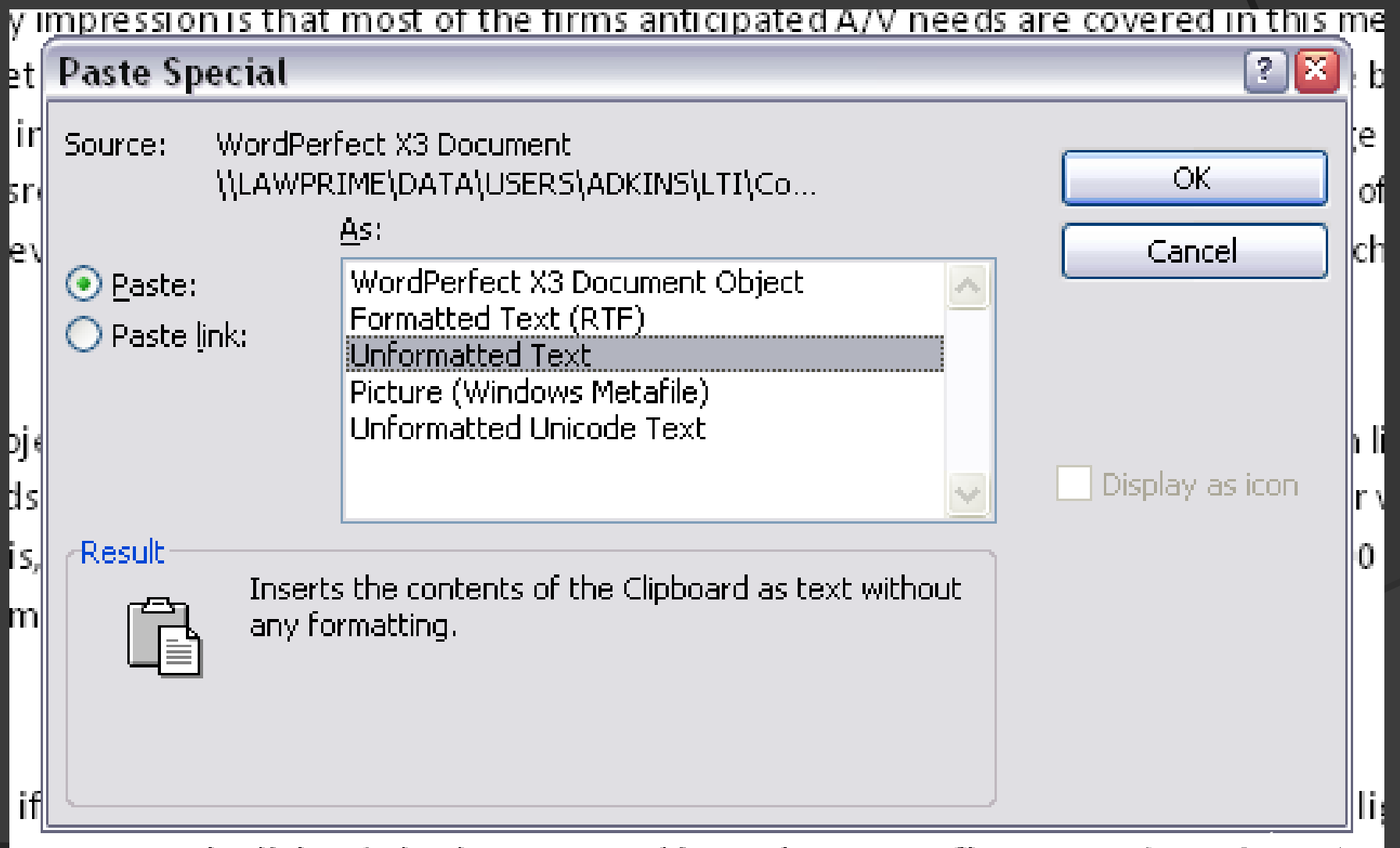
- Learn to use “Comments”
 - Comments / Add “Sticky Note”



MS Outlook #2

- ◎ If you don't use a CRM and you don't use a CMS, use Outlook for "CRM functions"
 - Client's personal information
 - Spouse's name & interesting information
 - Children's name(s) & interesting information
 - Birthdays, Anniversaries, other important dates
 - Interests, Hobbies

“Paste Special”



Go Green Tips #1

- ⦿ Go Paper Less (Ross Kodner)
 - Scanner, OCR, Document Management
- ⦿ Recycle everything
 - Put containers throughout the firm so they're everywhere – your staff can't miss them
- ⦿ Reduce electricity, just like at home
 - Energy efficient light bulbs
 - Fluorescent lights – skip every one or two
 - Automatic light “turner-offers”

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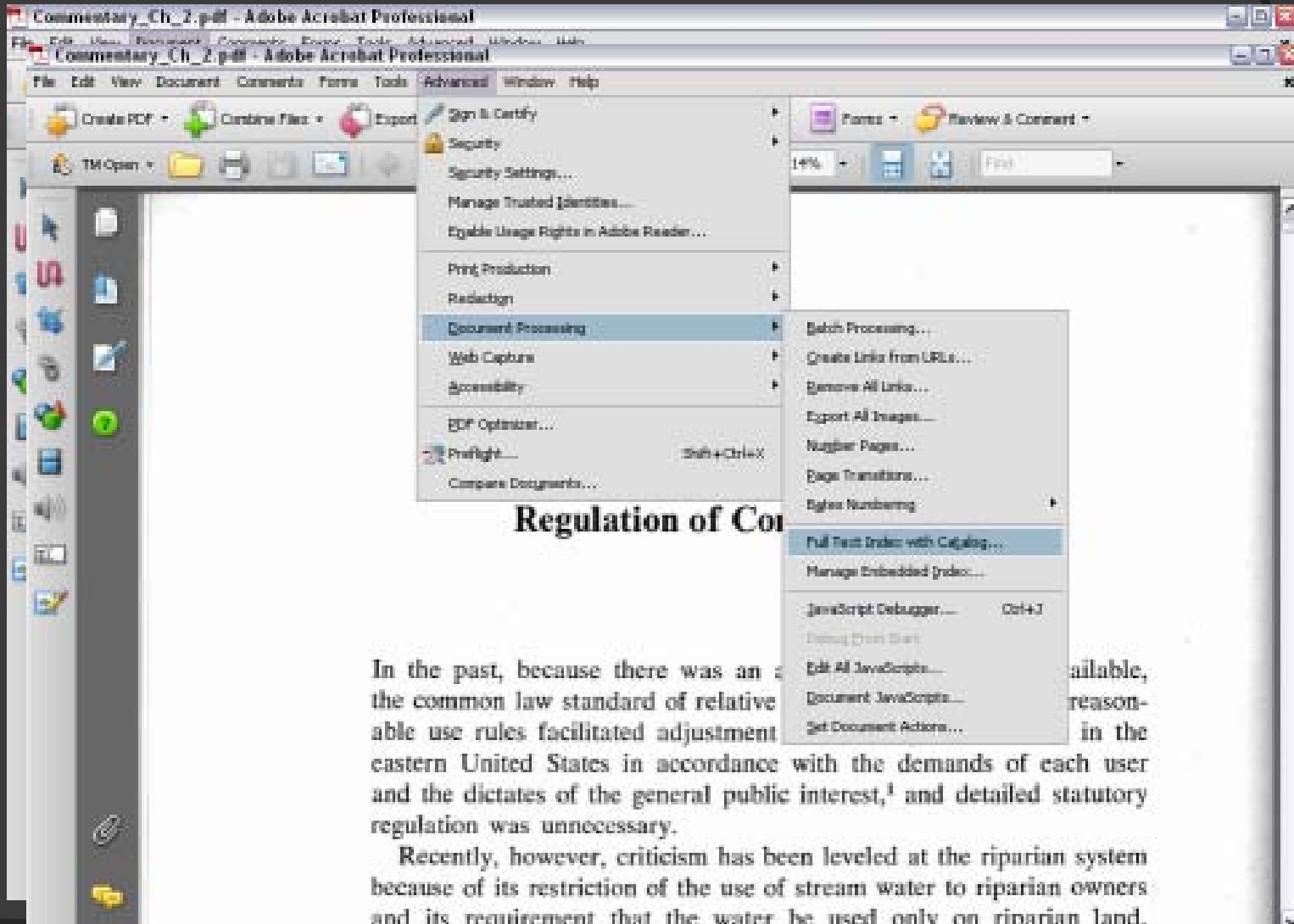
Go Green Tips #2

- Flat panel monitors instead of CRTs
- Employee suggestion box
 - You'd be surprised at what employees come up with; reward them for saving energy
- Use office supplies that use recycled goods
- ABA - "The Sustainable Law Office"
www.abanet.org/publicserv/environmental/sustainable_law_office.shtml

Personal Tech Tip #1

- Use your calendar to schedule a “free morning” or “free afternoon” once a month.
- Whether you take the time off or not is not important – if you don’t schedule it, you won’t take time off.
- Who’s going to take care of #1?

Adobe Acrobat 8 Tip #3



The screenshot shows the Adobe Acrobat 8 Professional interface. The 'Document Processing' menu is open, displaying various options. The 'Full Text Index with Catalog...' option is highlighted. The background document is a PDF titled 'Commentary_Ch_2.pdf' with the text 'Regulation of Co...' visible.

Regulation of Co

In the past, because there was an available, the common law standard of relative reasonable use rules facilitated adjustment in the eastern United States in accordance with the demands of each user and the dictates of the general public interest,¹ and detailed statutory regulation was unnecessary.

Recently, however, criticism has been leveled at the riparian system because of its restriction of the use of stream water to riparian owners and its requirement that the water be used only on riparian land.

Free Web Page Sucker

⦿ Mozilla Firefox

- “File / Save Page As / Web Page, complete”
- Saves entire web page, including live links

Internet Wayback Machine



- ◎ www.archive.org
- ◎ The Internet “never” goes away
- ◎ Find web pages from years ago

(more)

The Internet Lawyer - 1996

The Internet Lawyer

Navigating the Internet ... for the Legal Profession

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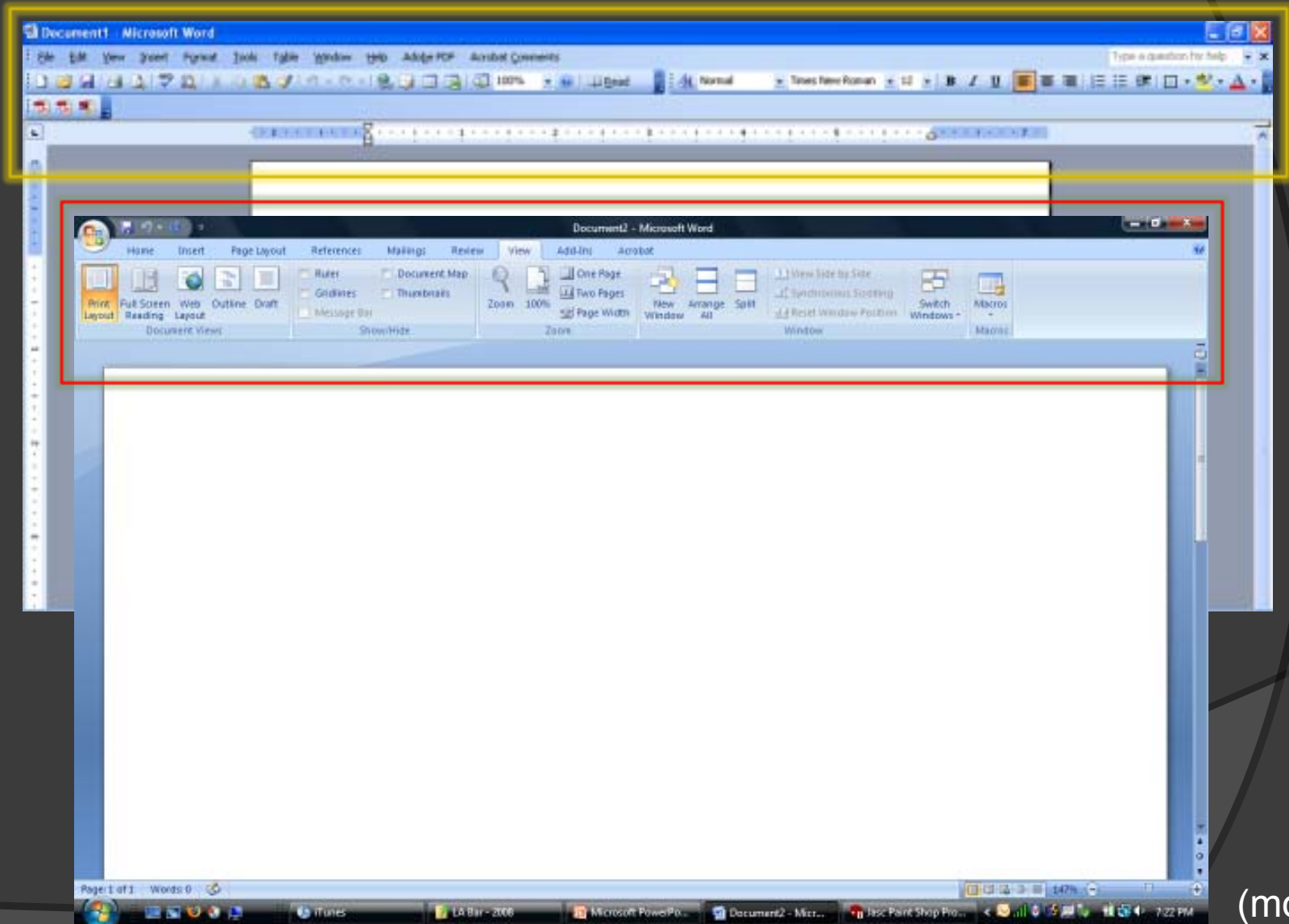
[Internet Lawyer
Law Firms](#)

MS Word 2007 v. 2003

- Word 2007 is a total different interface than Word 2003
 - Recognize that staff will need to understand the major differences
 - Need to learn a new toolbar “Ribbon”
 - More powerful feature: Document Compare

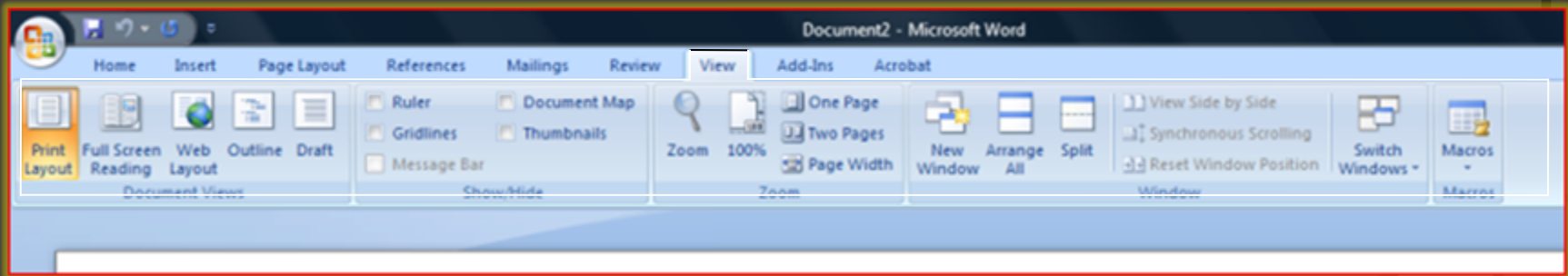
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Word 2007 v. 2003



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Word 2007 v. 2003



Time Tracking

- ◎ Use MS WordPad or MS Word
 - Enter time as worked; for multiple entries per client/matter, just keep adding (you are interrupted several times a day while working on the same matter)
 - Save timesheet daily in shared folder for your secretary to access
 - Of course, if you enter time directly into the timekeeping system, you wouldn't need this; only if you track time manually on paper and your secretary enters your time for you

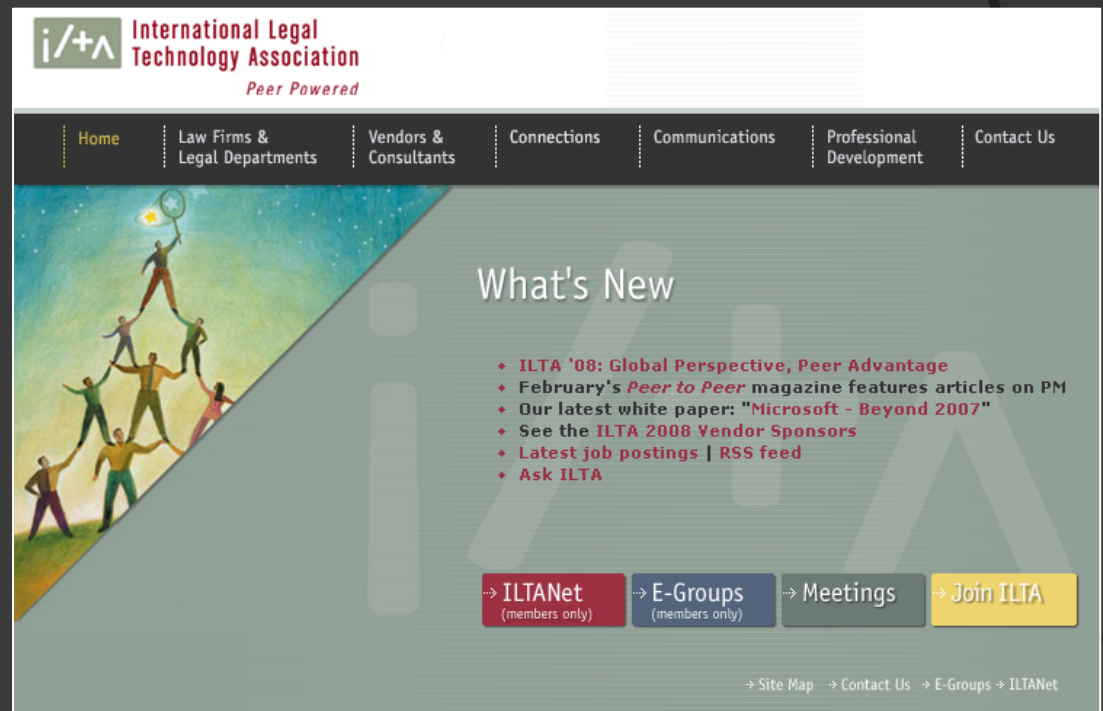
Law Practice Management Section

- ◎ Technology, Marketing, Financial, Management – “core” functions of law practice management
- ◎ www.lawpractice.org
 - Articles
 - Books
 - Resources

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ILTA – International Legal Technology Association

- White Papers
- Forums
- SIGs
- Annual Meeting



The screenshot shows the ILTA website homepage. At the top left is the logo 'i/+^' followed by the text 'International Legal Technology Association' and 'Peer Powered'. Below this is a dark navigation bar with links: Home, Law Firms & Legal Departments, Vendors & Consultants, Connections, Communications, Professional Development, and Contact Us. The main content area features a large graphic on the left showing a group of people standing on a hill, with one person at the top holding a glowing orb. To the right of this graphic is the heading 'What's New' followed by a list of updates: 'ILTA '08: Global Perspective, Peer Advantage', 'February's Peer to Peer magazine features articles on PM', 'Our latest white paper: "Microsoft - Beyond 2007"', 'See the ILTA 2008 Vendor Sponsors', 'Latest job postings | RSS feed', and 'Ask ILTA'. At the bottom of the main content area are four buttons: 'ILTANet (members only)', 'E-Groups (members only)', 'Meetings', and 'Join ILTA'. In the bottom right corner, there are links for 'Site Map', 'Contact Us', 'E-Groups', and 'ILTANet'.

- www.iltanet.org

Legal Technology Institute

- ◎ www.law.ufl.edu/lti
- ◎ Independent Legal Technology Consulting
- ◎ Case Management System Resources
- ◎ Legal Technology National Studies
- ◎ Consulting White Papers

Document Management (Solos & Small Firms)

◎ Worldox

- www.worldox.com
- \$395/user
- No SQL Server required
- Index “server” – desktop workstation
- Document & Email management
 - Full text retrieval
 - Linked to client/matter



Law Blogs

- Monica Bay – The Common Scold
- Jim Calloway – Law Practice Tips
- Rick Georges – The Future Lawyer
- Ross Kodner – Ross Ipsa Loquitur
- Adriana Linares – ihearttech

Thank You!

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