

ABA TECHSHOW[®]
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MARKETING • MANAGEMENT • TECHNOLOGY • FINANCE

April 2-4, 2009
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Tag, You're It! Calls, Voice Mail and Practice Management

Presenters:

Andrew Z. Adkins III

David L. Masters, Esq.

Agenda

- Introductions
- The Love-Hate Relationship with Technology
- Just When You Think You've Got It
- Is There a Silver Lining?
- What's on the Horizon?

Andrew Z. Adkins III

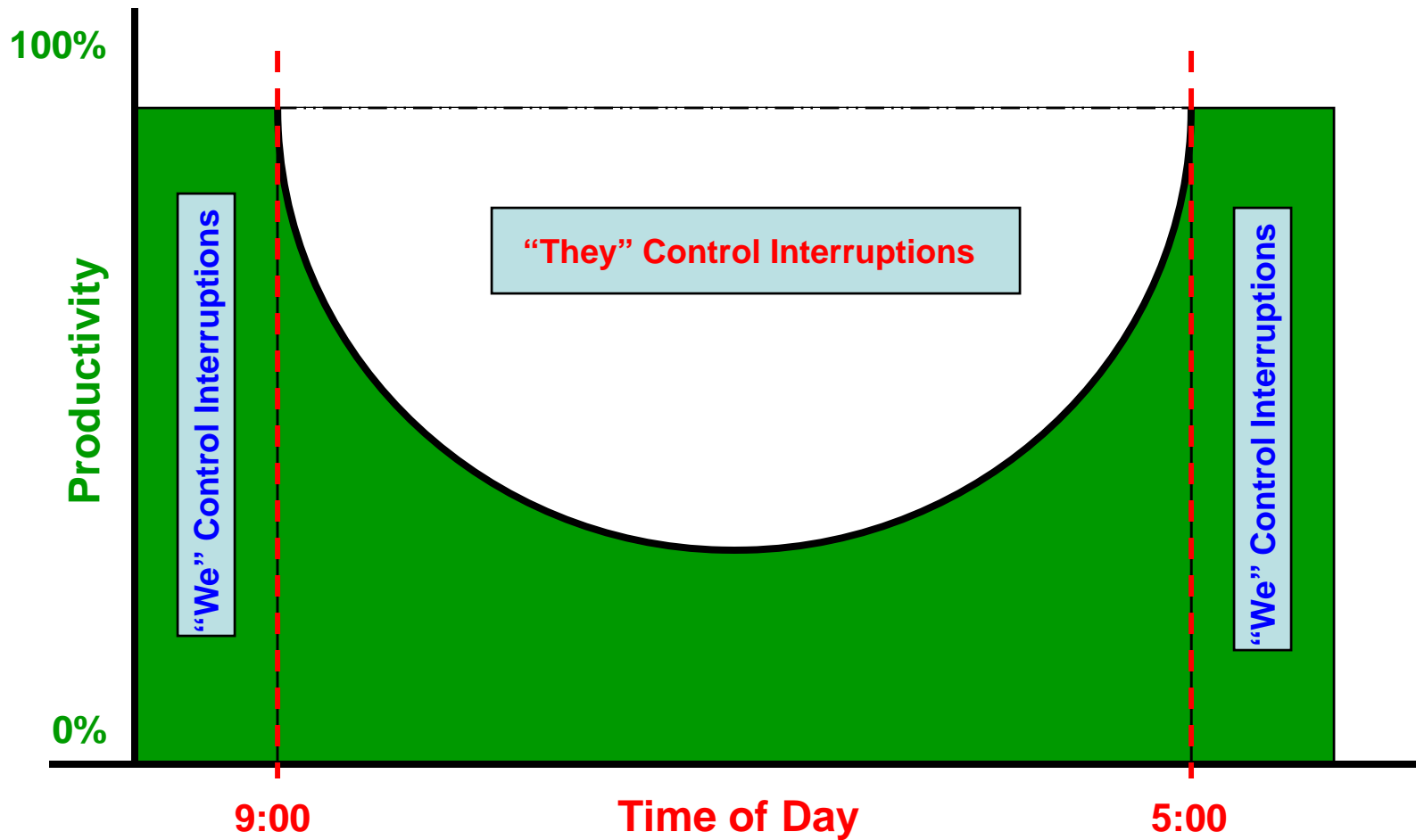
- University of Florida Levin College of Law (1997)
 - Director, Legal Technology Institute (1997)
 - Adjunct Professor, Law Practice Management (2001)
 - Associate Director, Technology Services (2003-2007)
 - Executive Director, ICAIR (1998 – present)
- Legal Technology Consultant (1989)
 - More than 325 consultations with Law Firms, Law Departments, Judiciary, Legal Verticals
- Author
 - *Three Years, Eleven Months, 29 Days* (2009)
 - *The Lawyer's Guide to Practice Management Systems Software* (2009)
 - *You Can't Get Much Closer Than This* (2005)
 - *Computerized Case Management Systems* (1999)
 - *WordPerfect Law Office Solutions* (1995)
 - *The KM Study, The ASP Study, The Internet Study*
 - More than 200 articles published on legal technology
- Chair ABA TECHSHOW 2000, 2001
- Co-Chair, LegalTech Conferences 2001 – 2007
- adkins@law.ufl.edu | 352-273-0765

David L. Masters

Lawyer: small firm lawyer; small firm general practice lawyer; small-firm small-town general practice lawyer; small-firm rural small-town general practice lawyer; high-tech country lawyer

Author: *The Lawyer's Guide to Acrobat 3d* (2008); Chapter 23, Electronic Briefs, *Colorado Appellate Practice Guide 5d*, (2005); Chapter 34, Adobe Acrobat for E-Filing and More, *Flying Solo 2d* (2005); Chapter 14, Securing Your Documents: Encryption, Digital Signatures and PDF, *Information Security for Lawyers and Law Firms* (2006)

The Productivity “Smile”



What Kinds of Interruptions?

- Phone Calls
- E-mails
- People
 - Attorneys
 - Staff



Voice Mail: Love or Hate?

- Audience Survey:
 - Generally
 - “I like voice mail”
 - Interruptions
 - “I tell my secretary to take a message or send to voice mail
 - “I can look at the Caller ID and let it go to voice mail”
 - Convenience
 - “I can check voice mail at *my* convenience”
 - Productivity
 - “I’m more productive with voice mail”
 - “I’d like to get notified via email of a voice mail message”

E-Mail: Love or Hate?

- Audience Survey
 - Generally
 - “I like e-mail”
 - Attachments
 - “Need ‘em”
 - “I have problems with e-mail attachments”
 - Interruptions
 - “I don’t know how to turn off the ‘Notify’ feature”
 - Convenience
 - “Who’s? Mine or yours?”
 - Productivity
 - “E-mail makes me more productive”

V-mail – E-Mail: Combined

- We are the “Microwave Generation”
 - “Just calling to see if you’ve received my email.”
- Portability
 - With a Smart Phone, E-mail notifies you of a voice mail message

Phone Tag Tips

- Expect to leave a message
 - Leave a “brief, detailed” message
- Respond within 24 hours
- Say whether or not your call needs to be returned
- Know that your message may be saved and stored digitally

E-mail Tips

- Turn off “Notify”
- Learn to use “filters” or “rules”
 - Automatically stored e-mails in folders
- Squash the office “jokes” and other unproductive emails
 - Create an “alias” e-mail address where users can send the joke; users can check at their convenience
- Learn to store collaborative documents and email the link to users
 - Saves on storage space, multiple copies of the same version

Client Communication Tips

- Set Client Expectations Up Front
 - What do they expect?
 - When can you deliver?
 - Don't tell them you're available 24x7x365
 - They'll call you during non-business hours because they know you won't be busy

“Unified” Communications

Blah, blah, blah, blah, blah, blah

*seamless
one login, one address book and
one inbox*

Can Practice Management Help Me Avoid Tag?

Project Form - Change

File Edit View Process Help

Save & Close Save Cancel

Primary Secondary Additional Custom Related Notes Documents Phone Email Mail Lexis Billing Timeline Outline

MatterRef Steptoe Johnson Code CONS|Consulting

MatterNo 08-04.1 Court Staff AZA|Andrew Z Adkins III

Plaintiff Defendant

Client Dean Turner Notify Trigger Review Billable Private Status

Related View Specified Automatic Options

All	Staff	Code	Client	Project	Status
Event Records (9)					
6/16/2008 9:00AM	Dean Turn	AZA	CALL	Steptoe Johnson - 08-04.1	
6/17/2008 5:45AM	Steptoe Jo	AZA	CONS.CONF	Steptoe Johnson - 08-04.1	
6/18/2008 8:00AM	Steptoe Jo	AZA	CONS.CONF	Steptoe Johnson - 08-04.1	
6/19/2008 7:00AM	Steptoe Jo	AZA	CONS.CONF	Steptoe Johnson - 08-04.1	
6/20/2008 7:30AM	Steptoe Jo	AZA	CONS.CONF	Steptoe Johnson - 08-04.1	
6/21/2008 5:20AM	Steptoe Jo	AZA	CONS.CONF	Steptoe Johnson - 08-04.1	
7/01/2008 3:15PM	Dean Turn	AZA	CALL	Steptoe Johnson - 08-04.1	
7/10/2008 10:00AM	Dean Turn	AZA	CALL	Steptoe Johnson - 08-04.1	
8/05/2008 11:15AM	Dean Turn	AZA	CALL	Steptoe Johnson - 08-04.1	
ToDo Records (1)					
8/07/2008	Steve Sebastian	AZA	TC	Steptoe Johnson - 08-04.1	
Contact Records (4)					
	McGowan, Steven	AZA	ATTY.CLNT	Steptoe Johnson - 08-04.1	
	Nelson, Mark	AZA	CLNT	Steptoe Johnson - 08-04.1	
	Turner, Dean	AZA	XO		
	Wernimont, Keith	AZA	CLNT.IT	Steptoe Johnson - 08-04.1	
Document Records (11)					
2/25/2008 4:48PM	PLA Stept	AZA	PRVI	Steptoe Johnson - 08-04.1	
2/25/2008 4:48PM	Project Lex	AZA	PRVI	Steptoe Johnson - 08-04.1	
2/25/2008 4:48PM	Steptoe Te	AZA	PRVI	Steptoe Johnson - 08-04.1	
5/14/2008 5:57PM	SDW Step	AZA	PRVI	Steptoe Johnson - 08-04.1	
5/14/2008 5:34PM	Technolog	AZA	PRVI	Steptoe Johnson - 08-04.1	
5/14/2008 4:25PM	LAN Upgre	AZA	PRVI	Steptoe Johnson - 08-04.1	
5/19/2008 5:24PM	Best Practi	AZA	PRVI	Steptoe Johnson - 08-04.1	
6/06/2008 11:31AM	Technolog	AZA	PRVI	Steptoe Johnson - 08-04.1	
6/06/2008 10:10AM	Consulting	AZA	PROP	Steptoe Johnson - 08-04.1	
6/06/2008 10:11AM	Consulting	AZA	PROP	Steptoe Johnson - 08-04.1	
6/09/2008 2:13PM	SteptoeDo	AZA	PRVI	Steptoe Johnson - 08-04.1	

Projects - Related

Calendared Events

ToDo Tasks

Contacts

Documents



Matter Form - Change

File Edit View Process Help

Save & Close Save [Icons] Cancel ?

Primary Secondary Additional Custom Related **Notes** Phone Email Billing Timeline Outline

MatterRef **Kinateder v. Today Realty** Code PO|PlntffOthr
MatterNo 659-01 Court Staff DLM|David L Masters
Plaintiff Defendant
Client David J. Kinateder 659 Notify Trigger Review Billable Private Status

View Specified Automatic [Icons] Options

All

	Staff	Code	Client	Matter	Status
Notes					
Related Records					
+ [Icon]	Note Records (7)				
+ [Icon]	Note Archive Records (9)				
+ [Icon]	Phone Records (5)				
+ [Icon]	Phone Archive Records (35)				
+ [Icon]	Email Records (357)				
+ [Icon]	Email Archive Records (556)				

Matters - Related



Matter Form - Change

File Edit View Process Help

Save & Close Save Cancel

Primary Secondary Additional Custom Related Notes **Phone** Email Billing Timeline Outline

MatterRef **Kinateder v. Today Realty** Code PO|PlntffOthr
MatterNo 659-01 Court Staff DLM|David L Masters
Plaintiff Defendant
Client David J. Kinateder 659 Notify Trigger Review Billable Private Status

View Specified Automatic Options

All

	Staff	Code	Client	Matter	Status
Related Records					
+ Note Records (7)					
+ Note Archive Records (9)					
+ Phone Records (5)					
+ Phone Archive Records (35)					
+ Email Records (357)					
+ Email Archive Records (556)					

Phone

Matters - Related



Matter Form - Change

File Edit View Process Help

Save & Close Save [Icons] Cancel ?

Primary Secondary Additional Custom Related Notes Phone **Email** Billing Timeline Outline

MatterRef **Kinateder v. Today Realty** Code PO|PlntffOthr
MatterNo 659-01 Court Staff DLM|David L Masters
Plaintiff Defendant
Client David J. Kinateder 659 Notify Trigger Review Billable Private Status

Related View Specified Automatic [Icons] Options

All	Staff	Code	Client	Matter	Status
Related Records					
+ [Icon]	Note Records (7)				
+ [Icon]	Note Archive Records (9)				
+ [Icon]	Phone Records (5)				
+ [Icon]	Phone Archive Records (35)				
+ [Icon]	Email Records (357)				
+ [Icon]	Email Archive Records (556)				

E-Mail

Matters - Related



The screenshot displays a software interface with a folder structure. At the top, there is a tab labeled 'All'. Below it, another 'All' label is visible. A folder named 'Related Records' is expanded, showing a list of sub-folders. The 'Email Records (357)' folder is highlighted in yellow. The sub-folders and their counts are as follows:

- Note Records (7)
- Note Archive Records (9)
- Phone Records (5)
- Phone Archive Records (35)
- Email Records (357)**
- Email Archive Records (556)

Date	Time	Subject	From	To
3/24/2009	Tue 12:47PM	FW: Kinateder v. Today Realty	DLM	Dawn Kinateder <dawndavelevi@gmail.com>
3/24/2009	Tue 12:45PM	Kinateder v. Today Realty	DLM	Kenneth Levinson <kll@balabanandlevinson.com>
3/24/2009	Tue 12:45PM	Kinateder v. Today Realty	DLM	Kenneth Levinson <kll@balabanandlevinson.com>
3/24/2009	Tue 7:15PM	RE: Kinateder Case	DLM	"Balaban & Levinson, P.C." <kll@balabanandlevinson.com>
3/24/2009	Tue 6:42PM	Ridiculousness	Dawn Kinateder <dawndavelevi@gmail.com>	"David L. Masters" <dmlm@masterslawfirm.com>
3/24/2009	Tue 6:12PM	Re: FW: Kinateder Case	Dawn Kinateder <dawndavelevi@gmail.com>	"David L. Masters" <dmlm@masterslawfirm.com>
3/24/2009	Tue 3:32PM	Kinateder Case	"Balaban & Levinson, P.C." <kll@balabanandlevinson.com>	dmlm@masterslawfirm.com
3/24/2009	Tue 3:17PM	FW: Kinateder Case	DLM	Dawn Kinateder <dawndavelevi@gmail.com>
3/24/2009	Tue 3:17PM	FW: Kinateder Case	DLM	Dawn Kinateder <dawndavelevi@gmail.com>
3/24/2009	Tue 1:39PM	Case: 2007CV107; Transaction: 24356438 - Notificat	"LexisNexis File and Serve" <eFile@fileandserve.com>	<dmlm@masterslawfirm.com>
3/24/2009	Tue 12:50PM	Re: FW: Kinateder v. Today Realty	Dawn Kinateder <dawndavelevi@gmail.com>	"David L. Masters" <dmlm@masterslawfirm.com>
3/23/2009	M... 1:52PM	RE: Trial Date?	DLM	Dawn Kinateder <Kinateder@qvh-colorado.orq>
3/23/2009	M... 1:15PM	Trial Date?	Dawn Kinateder <DKinateder@qvh-colorado.orq>	"dmlm@masterslawfirm.com" <dmlm@masterslawfirm.com>
3/23/2009	M... 11:09AM	Barbara Overbay	JBL	Dlm
3/23/2009	Sat 9:43AM	Re: Kinateder v. Today Realty	"Balaban & Levinson, P.C." <kll@balabanandlevinson.com>	"David L. Masters" <dmlm@masterslawfirm.com>
3/20/2009	Fri 4:01PM	Kinateder	JBL	barbara.overbay@prudential.com
3/19/2009	Thu 4:33PM	Fw: Kinateder v. Today Realty	David_Kinateder@blm.gov	dawndavelevi@gmail.com, dlm@masterslawfirm.com
3/19/2009	Thu 1:54PM	Re: Kinateder v. Today Realty	"Balaban & Levinson, P.C." <kll@balabanandlevinson.com>	"David L. Masters" <dmlm@masterslawfirm.com>
3/19/2009	Thu 12:23PM	Re: FW: RE: Kinateder v. Today Realty	Dawn Kinateder <dawndavelevi@gmail.com>	"David L. Masters" <dmlm@masterslawfirm.com>
3/19/2009	Thu 8:40AM	Kinateder v. Today Realty	DLM	Nathan Gurto <nathon.gurto@Aiq.com>
3/19/2009	Thu 8:35AM	Kinateder v. Today Realty	DLM	Nathan Gurto <nathon.gurto@Aiq.com>
3/19/2009	Thu 7:52AM	FW: RE: Kinateder v. Today Realty	DLM	Dawn Kinateder <dawndavelevi@gmail.com>
3/19/2009	Thu 7:52AM	FW: RE: Kinateder v. Today Realty	DLM	Dawn Kinateder <dawndavelevi@gmail.com>
3/19/2009	Thu 5:57PM	Re: Kinateder v. Today Realty	DLM	"Balaban & Levinson, P.C." <kll@balabanandlevinson.com>
3/18/2009	W... 5:47PM	RE: Kinateder v. Today Realty	"Balaban & Levinson, P.C." <kll@balabanandlevinson.com>	"David L. Masters" <dmlm@masterslawfirm.com>
3/18/2009	W... 4:56PM	Kinateder v. Today Realty	DLM	Kenneth Levinson <kll@balabanandlevinson.com>
3/18/2009	W... 12:36PM	Dawn and David Kinateder	JBL	barbara.overbay@prudential.com
3/18/2009	W... 11:18AM	RE: Kinateder v. Today Realty	DLM	"Balaban & Levinson, P.C." <kll@balabanandlevinson.com>
3/18/2009	W... 10:58AM	RE: Kinateder v. Today Realty	"Balaban & Levinson, P.C." <kll@balabanandlevinson.com>	"David L. Masters" <dmlm@masterslawfirm.com>
3/18/2009	W... 9:54AM	Kinateder v. Today Realty	DLM	Kenneth Levinson <kll@balabanandlevinson.com>
3/18/2009	W... 5:47PM	RE: Kinateder v. Today Realty	"Balaban & Levinson, P.C." <kll@balabanandlevinson.com>	"David L. Masters" <dmlm@masterslawfirm.com>
3/17/2009	Tue 8:14PM	RE: Kinateder v. Today Realty	DLM	"Balaban & Levinson, P.C." <kll@balabanandlevinson.com>
3/17/2009	Tue 5:30PM	Kinateder v. Today Realty	"Balaban & Levinson, P.C." <kll@balabanandlevinson.com>	"David L. Masters" <dmlm@masterslawfirm.com>
3/17/2009	Tue 2:22PM	Kinateder v. Today Realty	DLM	Cheremi Costigan <cbc@balabanandlevinson.com>
3/17/2009	Tue 1:38PM	Today Realty	DLM	Dawn Kinateder <David_Kinateder@blm.gov>, Dawn Kinateder <dawndavelevi@gmail.com>
3/17/2009	Tue 9:02PM	Case: 2007CV107; Transaction: 24260547 Transaction	"LexisNexis File and Serve" <eFile@fileandserve.com>	<dmlm@masterslawfirm.com>
3/17/2009	Tue 8:43PM	Re: FW: RE: Kinateder v. Today Realty	Dawn Kinateder <dawndavelevi@gmail.com>	"David L. Masters" <dmlm@masterslawfirm.com>
3/17/2009	Tue 8:39PM	FW: RE: Kinateder v. Today Realty	DLM	Dawn Kinateder <dawndavelevi@gmail.com>
3/17/2009	Tue 8:36PM	RE: Kinateder v. Today Realty	"David L. Masters" <dmlm@masterslawfirm.com>	"Balaban & Levinson, P.C." <kll@balabanandlevinson.com>
3/17/2009	Tue 8:23PM	Re: Today Realty	Dawn Kinateder <dawndavelevi@gmail.com>	"David L. Masters" <dmlm@masterslawfirm.com>
3/17/2009	Tue 8:19PM	Re: Today Realty	DLM	Dawn Kinateder <dawndavelevi@gmail.com>
3/17/2009	Tue 8:17PM	Re: Today Realty	Dawn Kinateder <dawndavelevi@gmail.com>	"David L. Masters" <dmlm@masterslawfirm.com>
3/17/2009	Tue 11:18AM	Case: 2007CV107; Transaction: 24246361 - Notificat	"LexisNexis File and Serve" <eFile@fileandserve.com>	<dmlm@masterslawfirm.com>
3/17/2009	Tue 7:27AM	Today Realty	DLM	Dawn Kinateder <dawndavelevi@gmail.com>
3/17/2009	Tue 9:02PM	RE: Kinateder v. Today Realty	DLM	"Balaban & Levinson, P.C." <kll@balabanandlevinson.com>
3/16/2009	M... 4:53PM	Case: 2007CV107; Transaction: 24236473 - Notificat	"LexisNexis File and Serve" <eFile@fileandserve.com>	<dmlm@masterslawfirm.com>

ATTENTION

FROM

In Summary . . .

- Find Your Productive Times and Make Them Work For You
- Set Client Expectations
- Set Office Expectations
- Reduce Interruptions
 - Know you're going to be interrupted, but control the "available interruption" times
 - Learn to take advantage of the technology
 - Close your door
 - Work in the library (i.e., "hide")



Thank You!

Andrew Z. Adkins III
David L. Masters, Esq.