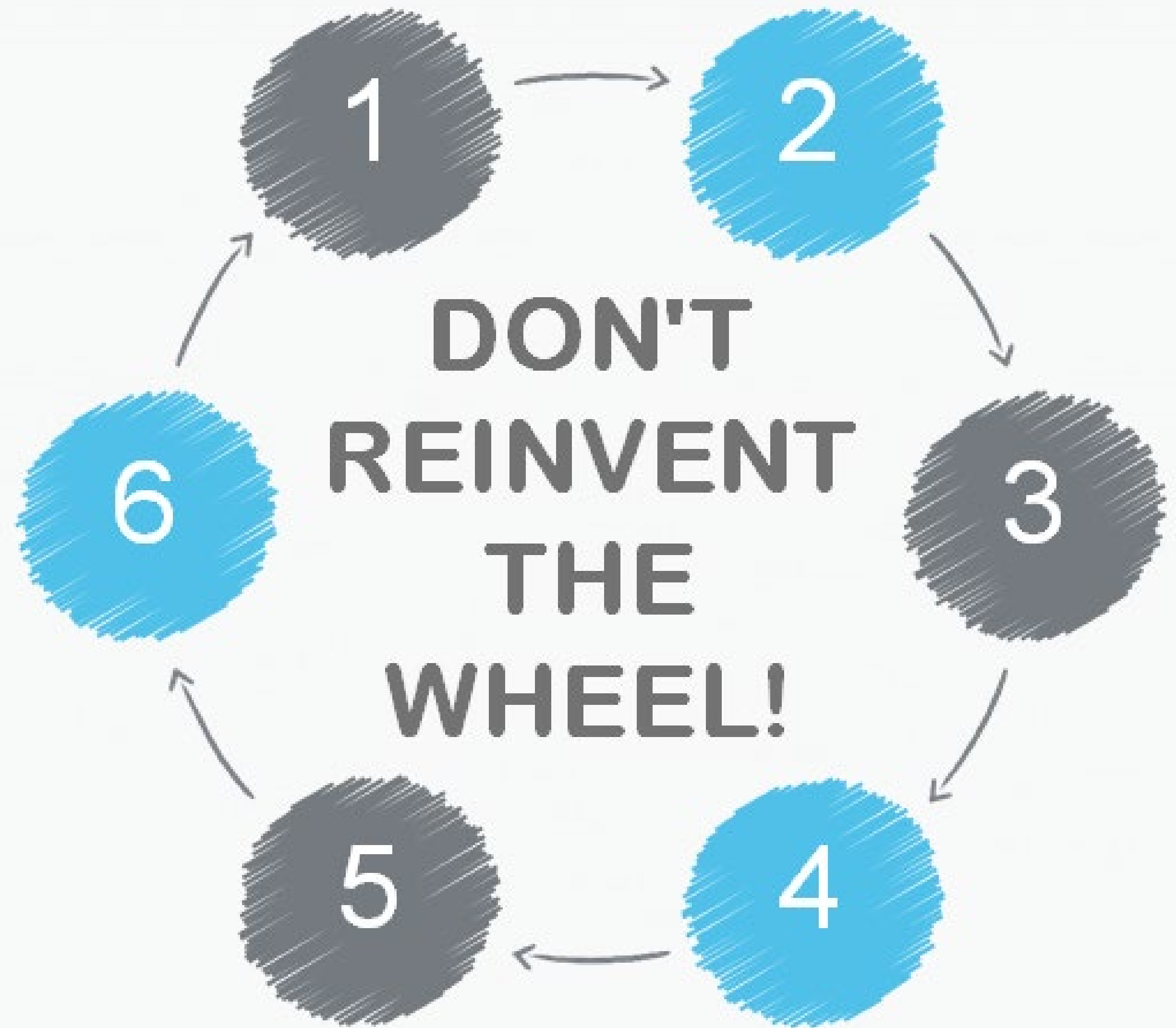


# Technology Solutions for Common Law Practice Productivity Problems

January 22, 2020

*Webinars for Busy Lawyers  
Mass LOMAP*



# Reinvent the Wheel - Definition

“to **redo work unnecessarily** when it has already been done satisfactorily; to rethink an already working system, technique, etc. in a needless attempt to improve it.”

[http://en.wiktionary.org/wiki/reinvent\\_the\\_wheel](http://en.wiktionary.org/wiki/reinvent_the_wheel)

Nahhhh...I don't think It will work. Let's do something different...something smarter...something cooler!



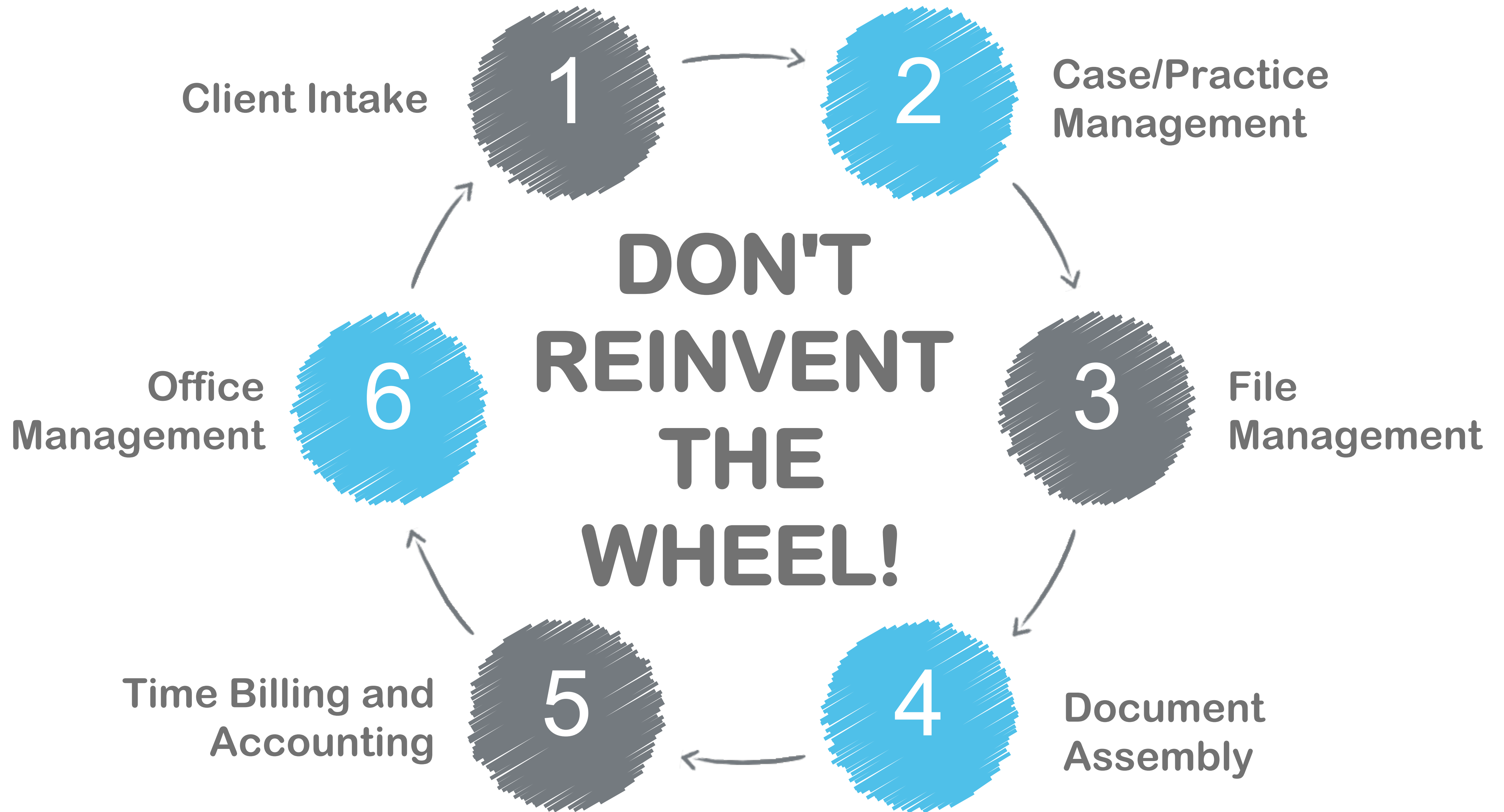
# TODAY'S AGENDA

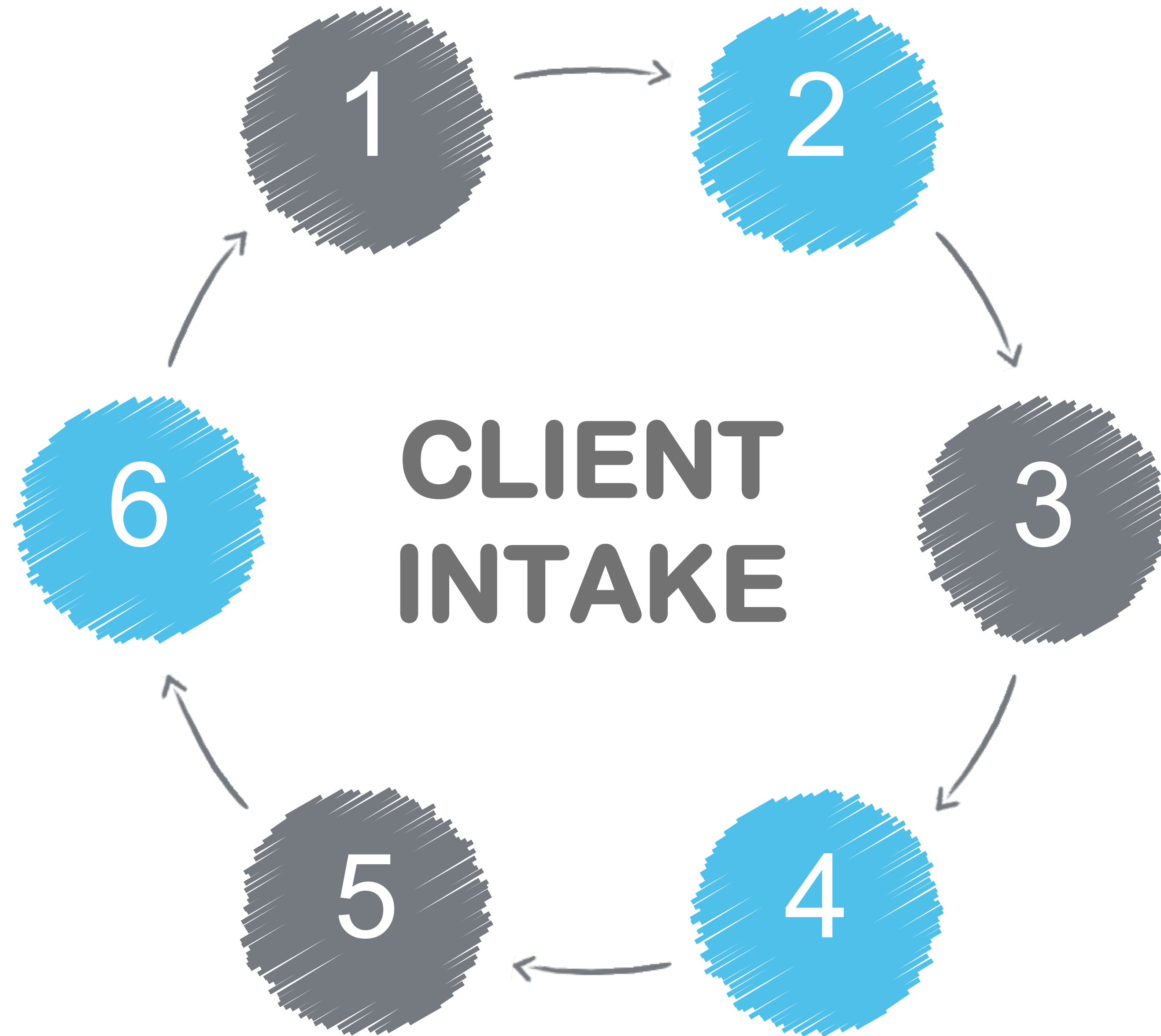
- **Productivity vs. Efficiency**
- **Typical Law Office Inefficiencies**
- **Efficiencies for Your Firm**
- **Take "Home" Work**



Photo by [Nathan Dumlaog](#) on [Unsplash](#)

# Productivity vs. Efficiency





# What You Probably Do

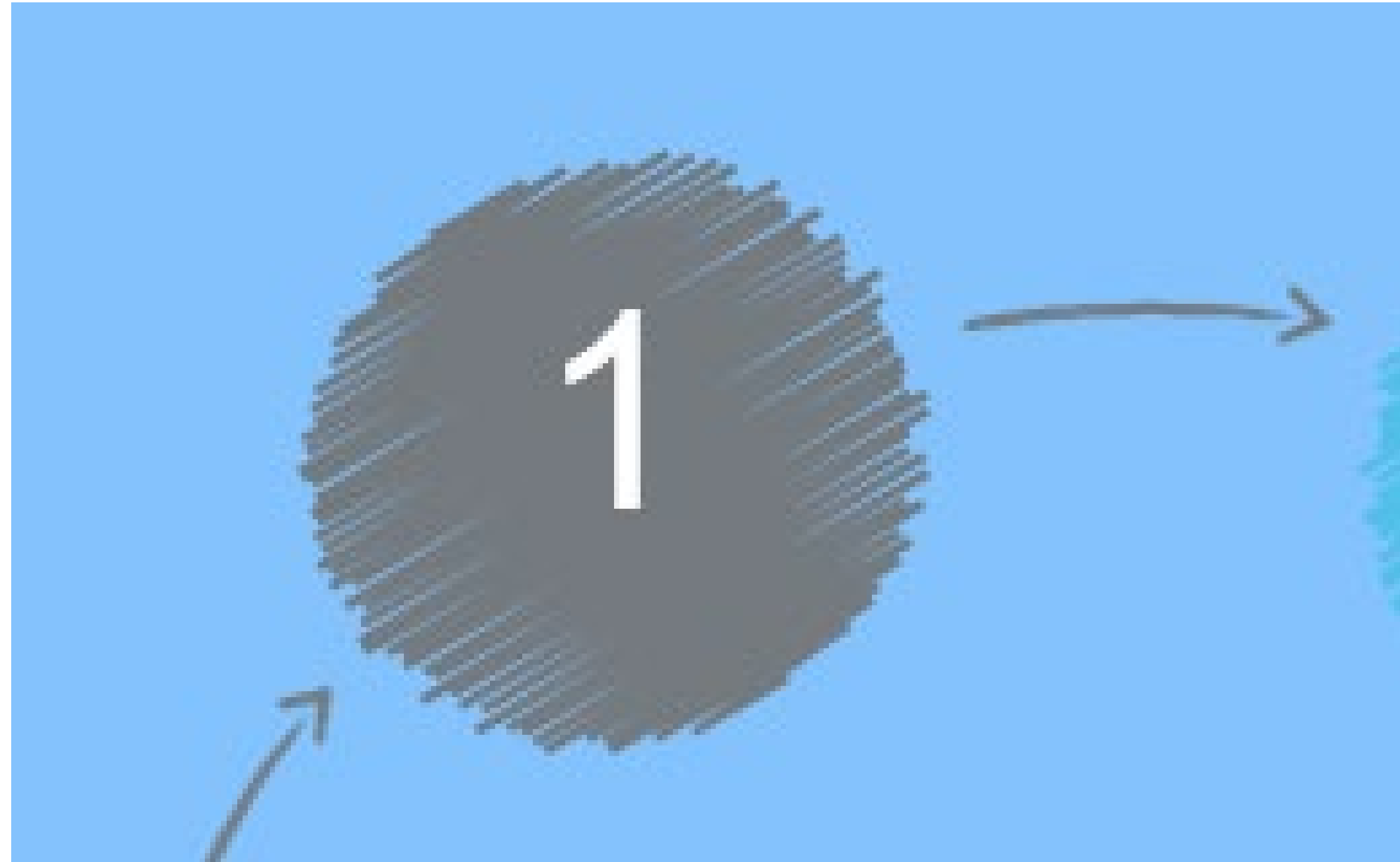
- Have clients complete paper or web-based intake forms
- Fail to properly reuse information provided on intake forms
- Forgo “really formal” conflict of interest checks
- Retype or re-enter data throughout representation
- Fail to use information provided on intake forms to track and leverage for business



Photo by Nik MacMillan on Unsplash



# What You Could Do



**Automate your intake process!**

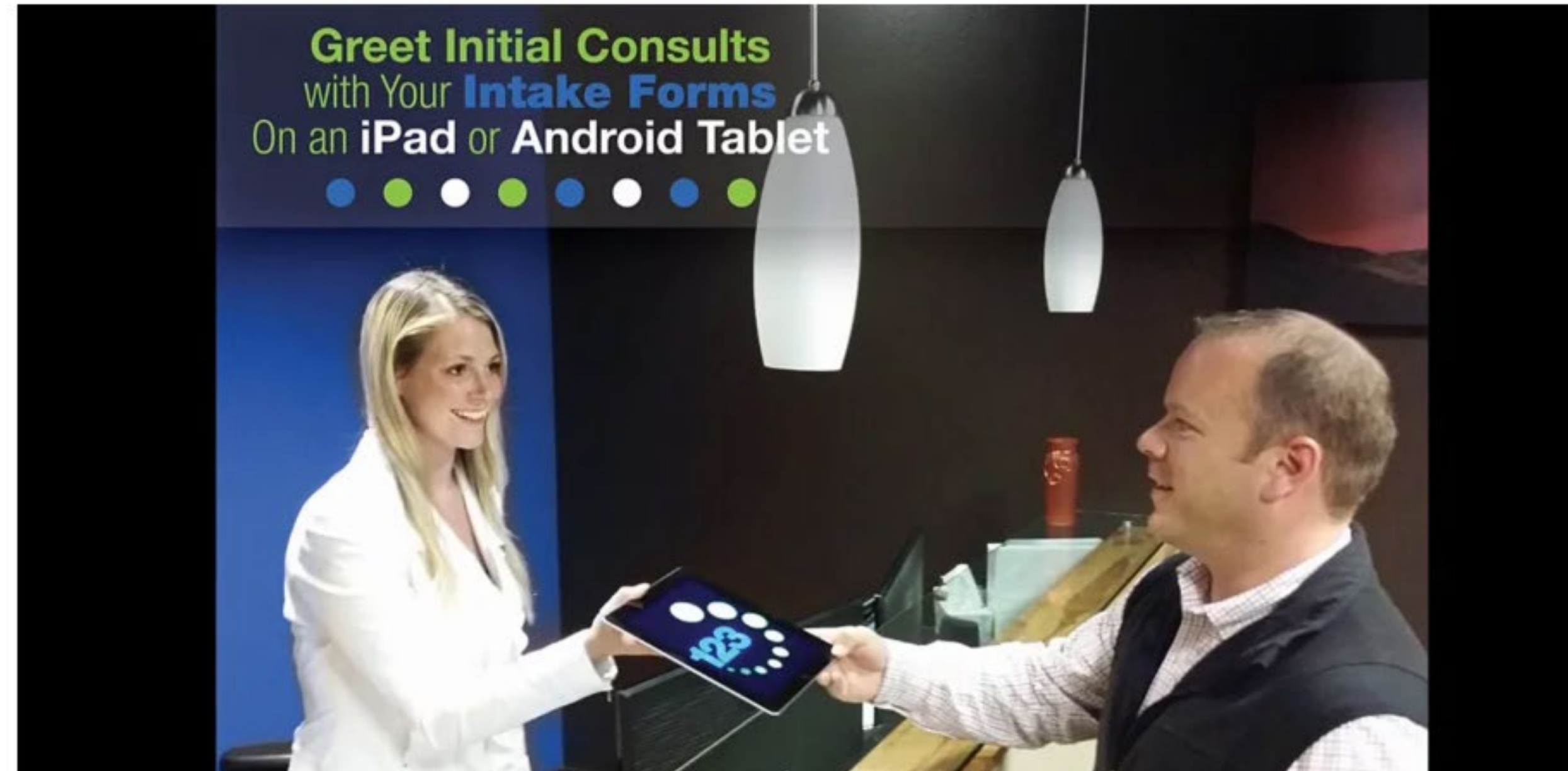
# Use standalone intake systems



[Home](#) [Pricing](#) [Help Center](#) [Sign In](#)

Win More Clients... Easy as 

Most people decide to return to a business -- or not -- within the first 5 minutes of their visit.



# Consider compliance-checking systems

The screenshot displays the Amiqus website with a navigation bar at the top containing the logo and links for Amiqus ID, Sectors, Company, and Careers. On the right side of the navigation bar are 'Log in' and 'Book demo' buttons. Below the navigation bar is a secondary menu with 'Amiqus ID', 'Overview', 'Features' (highlighted), 'Customer stories', 'Pricing', and 'Product tour'. The main content area is organized into three sections: 'Basic Disclosure' (UK wide), 'Companies lookup' (Worldwide), and 'Watchlist' (Worldwide). The 'Say goodbye to endless admin' section includes 'Custom forms', 'Assigning work', and 'Document management'. The 'Maximise security and compliance' section includes 'User access levels', 'Audit logs', and 'Two factor authentication (2FA)'. A blue chat bubble icon is located in the bottom right corner.

**amiquus** Amiqus ID Sectors Company Careers [Log in](#) [Book demo](#)

**Amiqus ID** Overview **Features** Customer stories Pricing Product tour

**Basic Disclosure** UK wide  
Get faster results and recruit the right candidate by requesting all Basic Disclosure checks through Amiqus ID.

**Companies lookup** Worldwide  
Check company directors, ownership and control with our Companies House and Open Corps Integration, covering 120 million entities.

**Watchlist** Worldwide  
Screen domestic and international, politically exposed persons (PEPs) and sanctions lists, as well as adverse media data from 500 million web pages, with option for ongoing monitoring.

**Say goodbye to endless admin**

**Custom forms**  
Capture and store further information about clients and staff - particularly useful for onboarding and risk assessments.

**Assigning work**  
Customise the list of assignees to suit your needs, making it easy and flexible for your team to manage their activities and workflow.

**Document management**  
Send, receive and upload documents. Advanced options allow you to download receipts and return instructions to easily fit with your workflow.

**Maximise security and compliance**

**User access levels**  
Each of your team members have different responsibilities, so we empower you to control

**Audit logs**  
Simplify future audits with activity tracking to record all key interactions, updates and actions

**Two factor authentication (2FA)**  
Increase security by adding an extra layer of protection to your accounts and data.

# Review features and pricing

NEW PRICING — FOR A LIMITED TIME SAVE \$20/USER/MONTH ON ALL MONTHLY TIERS!

## A price for every size law practice

MONTHLY



YEARLY

SAVE 15%

### STARTER

- ✓ 500 Contacts
- ✓ 2 Automations
- ✓ 3 Custom Forms
- ✓ 5 eSignatures/mo
- ✓ 5 Custom Reports
- ✓ 10 Custom Emails

Was ~~\$49~~

**\$29**

/user/month

+ \$499 One-time Setup Charge

### GROWTH

- ✓ 15,000 Contacts
- ✓ 15 Automations
- ✓ 10 Custom Forms
- ✓ 20 eSignatures/mo
- ✓ 15 Custom Reports
- ✓ 25 Custom Emails

Was ~~\$69~~

**\$49**

/user/month

+ \$499 One-time Setup Charge

### PRO

- ✓ Unlimited Contacts
- ✓ Unlimited Automations
- ✓ Unlimited Custom Forms
- ✓ Unlimited eSignatures/mo
- ✓ Unlimited Custom Reports
- ✓ Unlimited Custom Emails

Was ~~\$89~~

**\$69**

/user/month

+ \$499 One-time Setup Charge



# Client Intake/CRM Features from Lawyerist.com

---

## Client Intake, CRM, & Marketing Automation Software Feature Descriptions

**Automated Workflows.** A core feature of marketing automation software and many intake and CRM tools is the ability to automate workflows like follow-up emails after a potential client inquiry, pre-consult questionnaires, new client onboarding, and more.

**Appointment Scheduling.** With appointment scheduling, you can connect your calendar and let potential clients pick consultation slots right from your website.

**Calendar Sync.** Sync up your calendar so you can see associated appointments when viewing a potential client's record.

**Email Templates.** Building out your marketing workflows is quicker and easier if you have templates to work from.

**Email Sync.** Sync up your email account so you can see emails sent or received when viewing a potential client's record.

**Text Messaging.** While email is a fairly standard part of most software, your clients may prefer text messaging. If so, you'll want to keep track of them in your software so you can see your conversations associated with potential clients.

**Document Templates.** When it comes to intake questionnaires or engagement letters, a template can help get you up and running with your software more easily.

**eSignatures.** Allow clients to sign and return documents quickly, using their computer or phone—but not a printer.

**Analytics.** See reports like the number of clients in each stage of your marketing or intake process, or the return on investment from your various marketing investments.

# Client Portal Intake - DirectLaw

GRANAT LEGAL SERVICES, P.L.L.C.

DCDivorceOnline MyLegalAffairs™

Legal Documents | Legal Advice Phone Call | Legal Advice E-mail | Legal & Court Coaching | Legal Document Review | Legal

### Attorney Prepared Documents

Our Attorney-Prepared Legal Documents include legal advice from our law firm and are offered at the fixed prices listed below.

How it works:

1. Click on a document name to purchase it.
2. Complete a simple, online Questionnaire and submit it to us via our web site.
3. An attorney will review your submitted Questionnaire and contact you if additional information is needed to clarify your intent, if no language to make sure the document reflects your intent and is right for your circumstances.

Granat Legal Services, P.L.L.C.  
1629 K Street, N.W., Suite 300  
Washington, D.C. 20006

Phone: 202-609-9836 • Fax: 561-828-5812 • [Email](#)

Granat Legal Services, P.L.L.C. represents divorce clients online in Washington, DC.

Internet | Protected Mode: On | 100%

# Practice Management Intake - MyCase

**mycase** | What's New | Natalie Kelly | Find clients, cases, and items...

Home | Calendar | Tasks | Contacts

Dashboard | Recent Activity

Add Item

Event | Document | Invoice | Note

Recent Activity

All | Invoices | Events | Documents

Natalie Kelly (Attorney) added lead

Natalie Kelly (Attorney) updated a

Natalie Kelly (Attorney) changed pe

Natalie Kelly (Attorney) added a tin

Natalie Kelly (Attorney) added an e

Natalie Kelly (Attorney) added even Bell Acquisition

Natalie Kelly (Attorney) updated ca

Natalie Kelly (Attorney) updated ca

Start Timer | Add Item | Add Event | Add Task

### Add Lead

**Potential New Client**

Lead Name: First Name [M] Last Name

Email: example@email.com

Cell phone: (xxx)-xxx-xxxx

Add More Contact Information

Referral Source: Advertisement | Add New Referral Source

Referred By: Search for an existing contact or company

Lead Details: Add notes related to this individual...

Custom Fields for Lead

---

**Potential New Case**

Date Added: 01/21/2020

Status: New

Practice Area: Adoption

Potential Value of Case: \$ 0

Assign To: Select...





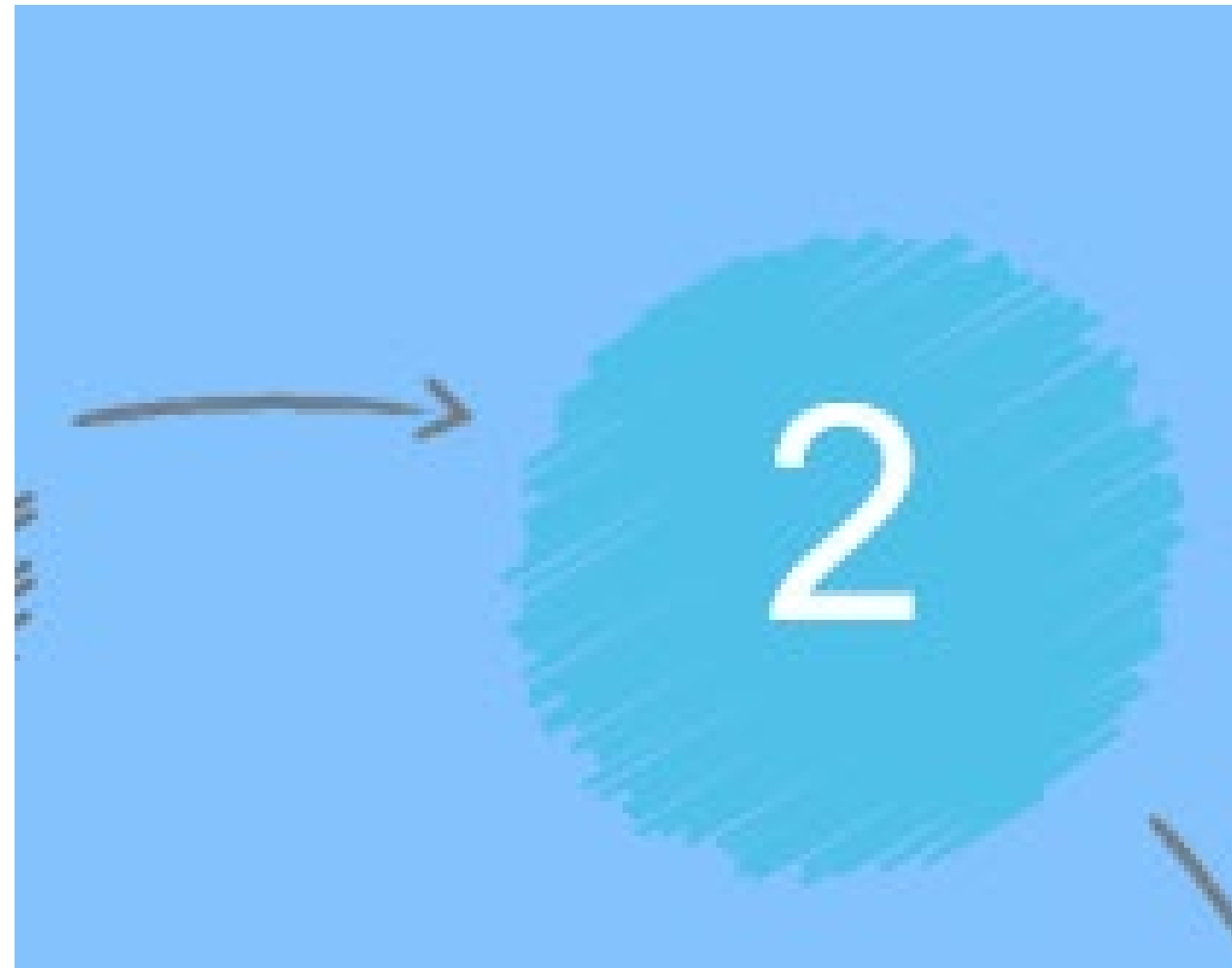
# What You Probably Do

- **Attempt to track file information in your head**
- **Use computer file folders for keeping up with data**
- **Attempt to track file information via Outlook Folders (or the Inbox!)**
- **Use computer file folders for keeping up with data**



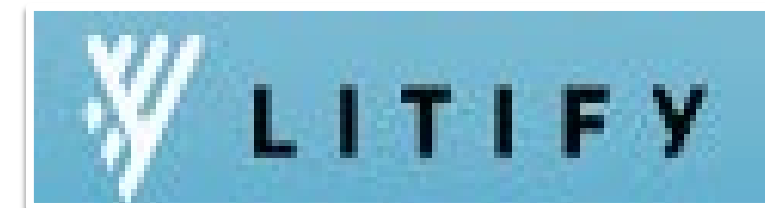
Photo by Sebastian Herrmann on Unsplash

# What You Could Do



**Use a practice management system in your practice!**

# Practice Management Options









# Futuristic Practice Management Options

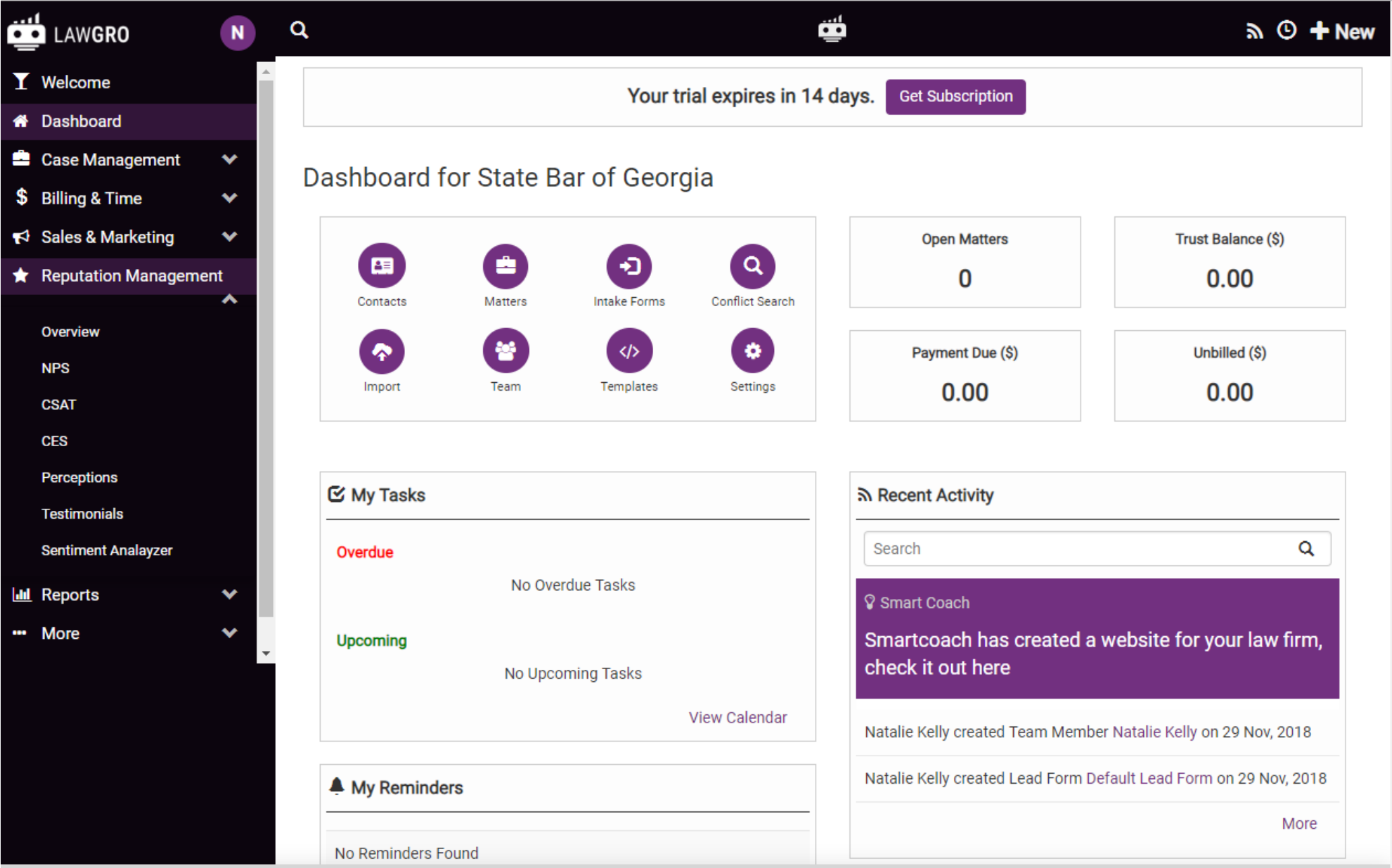


## DESIGNED WITH YOU IN MIND

### AN EXPERIENCED SYSTEM MAKES ALL THE DIFFERENCE

Our unique platform enables you to build a system that captures the institutional knowledge of your team in order to manage clients, matter, and overall business needs more effectively than ever before. OMNI Legal's AI engine brings together all the pieces necessary to optimize your everyday business efforts through key activities including:

-  Deep data integration that fuels AI processing
-  Agile process design that powers customizable workflows
-  Smart conditions that automate team progress
-  AI pattern recognition that drives best practices development
-  Outcome prediction that improves efficiency and reduces bottlenecks
-  Collaborative client portal that improves engagement



How likely are you to recommend LawGro to a friend or co-worker?

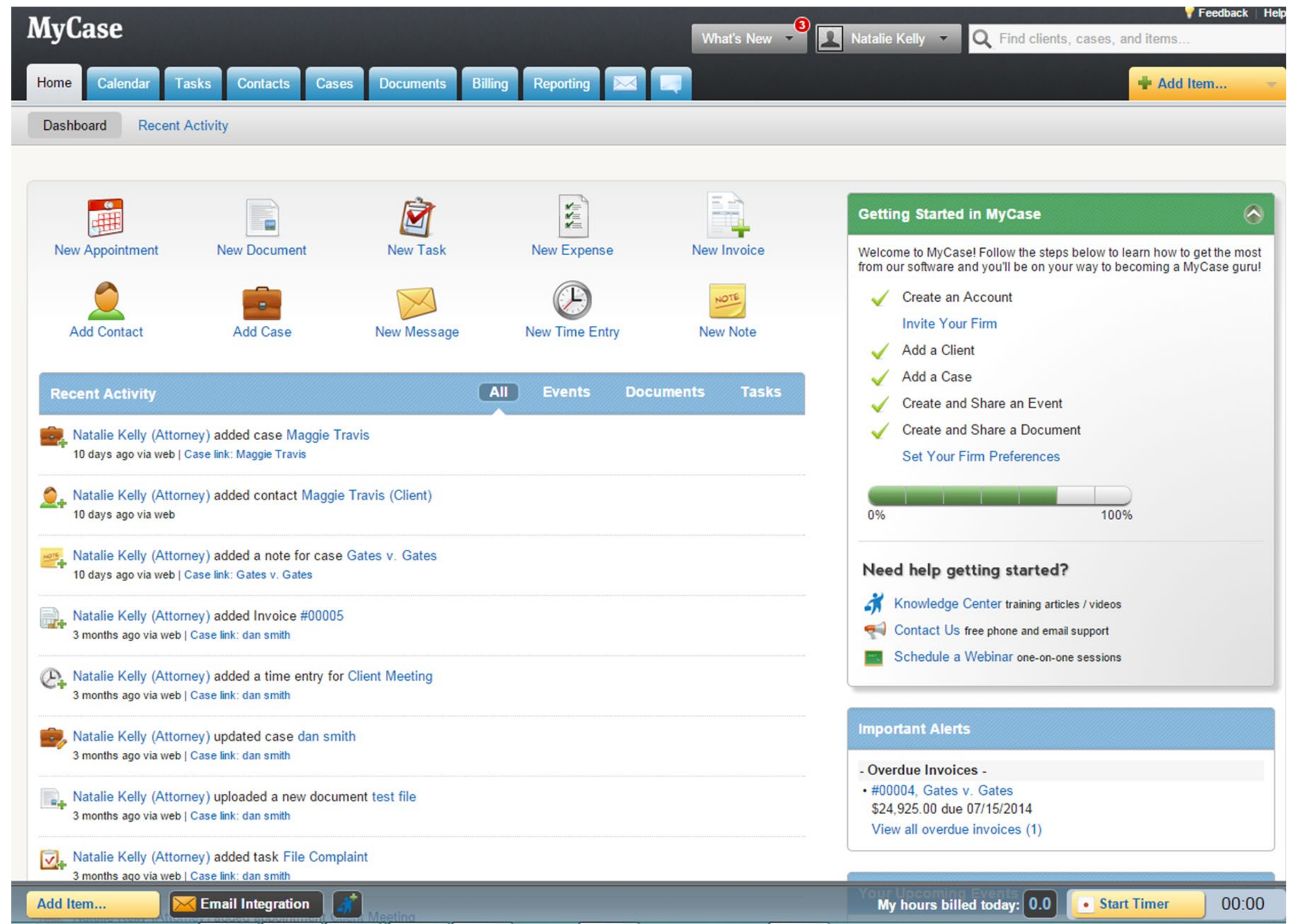
Not at all likely 0 1 2 3 4 5 6 7 8 9 10 Extremely likely

Powered by Wootric

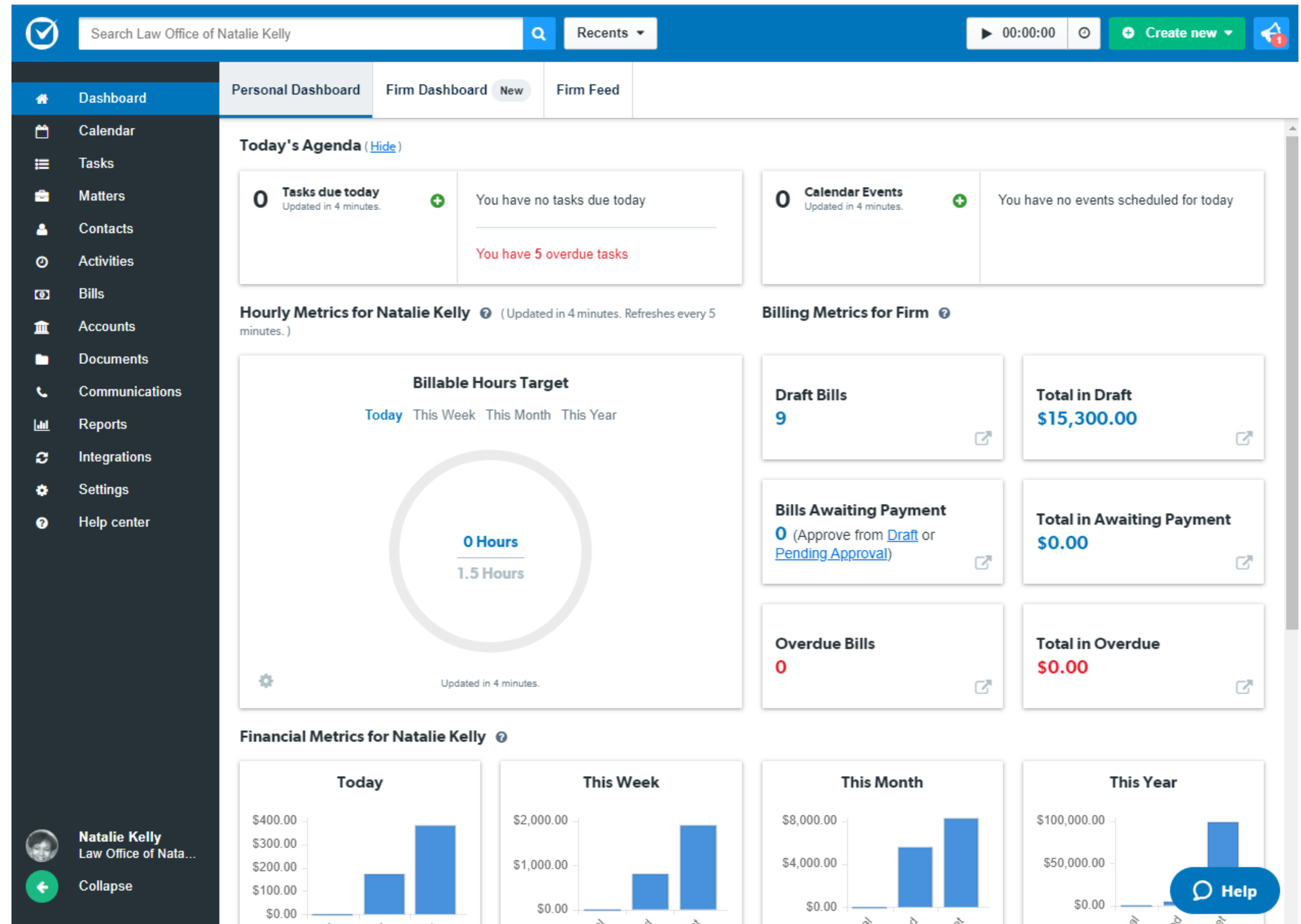
# Immigration- Specific Practice Management Solutions

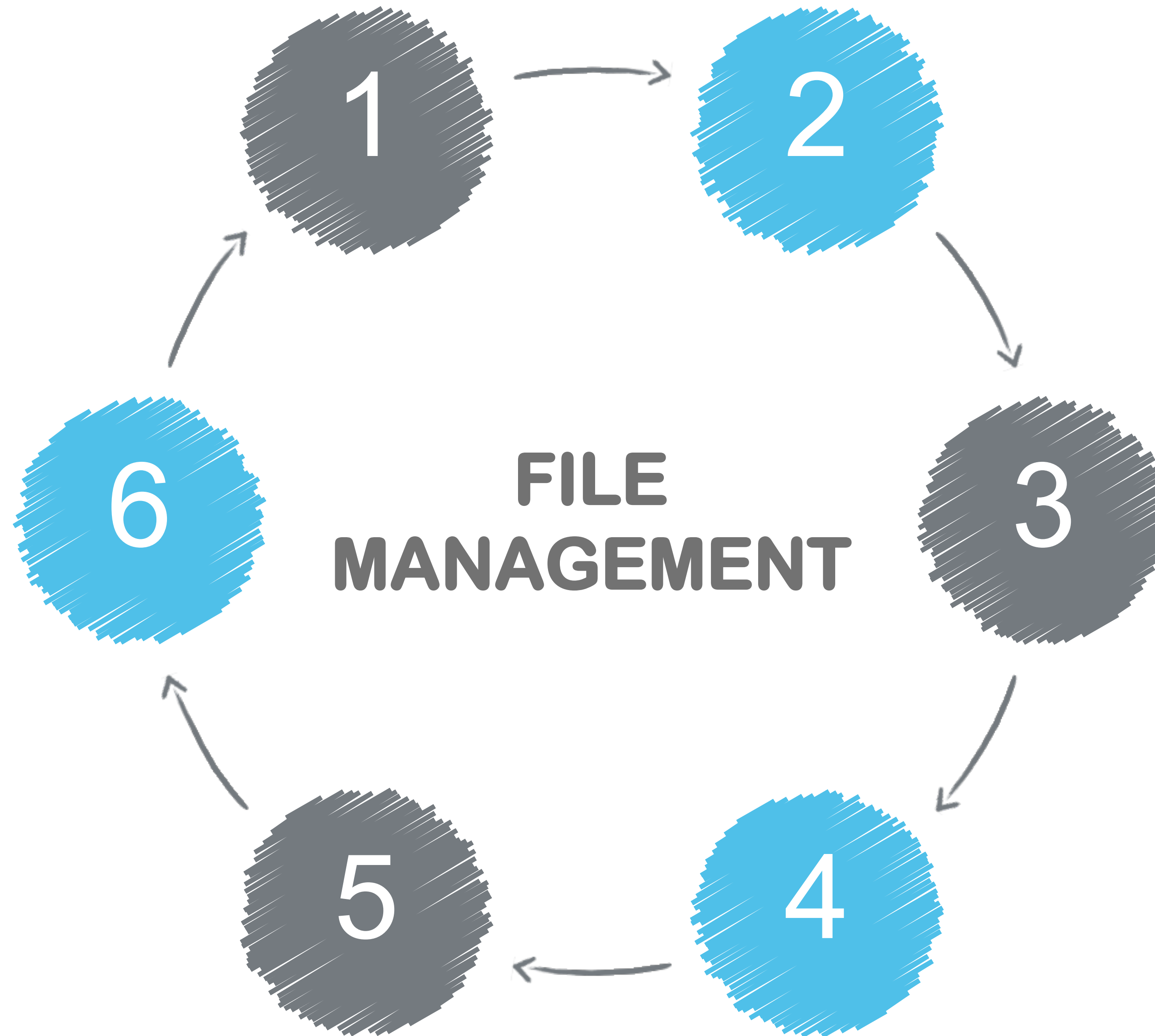


- Manage complete file information
- Generate master calendar for access by all
- Delegate tasks and automate workflows
- Maintain firm-wide contact lists
- Track time
- Manage all communications – phone and email
- Organize and manage file documents



- Dashboard for easy data entry and navigation
- “Feed” for sharing status
- Email, billing and time tracking tools
- Enhanced access via tabbed visual layout
- Client and related party access and notifications





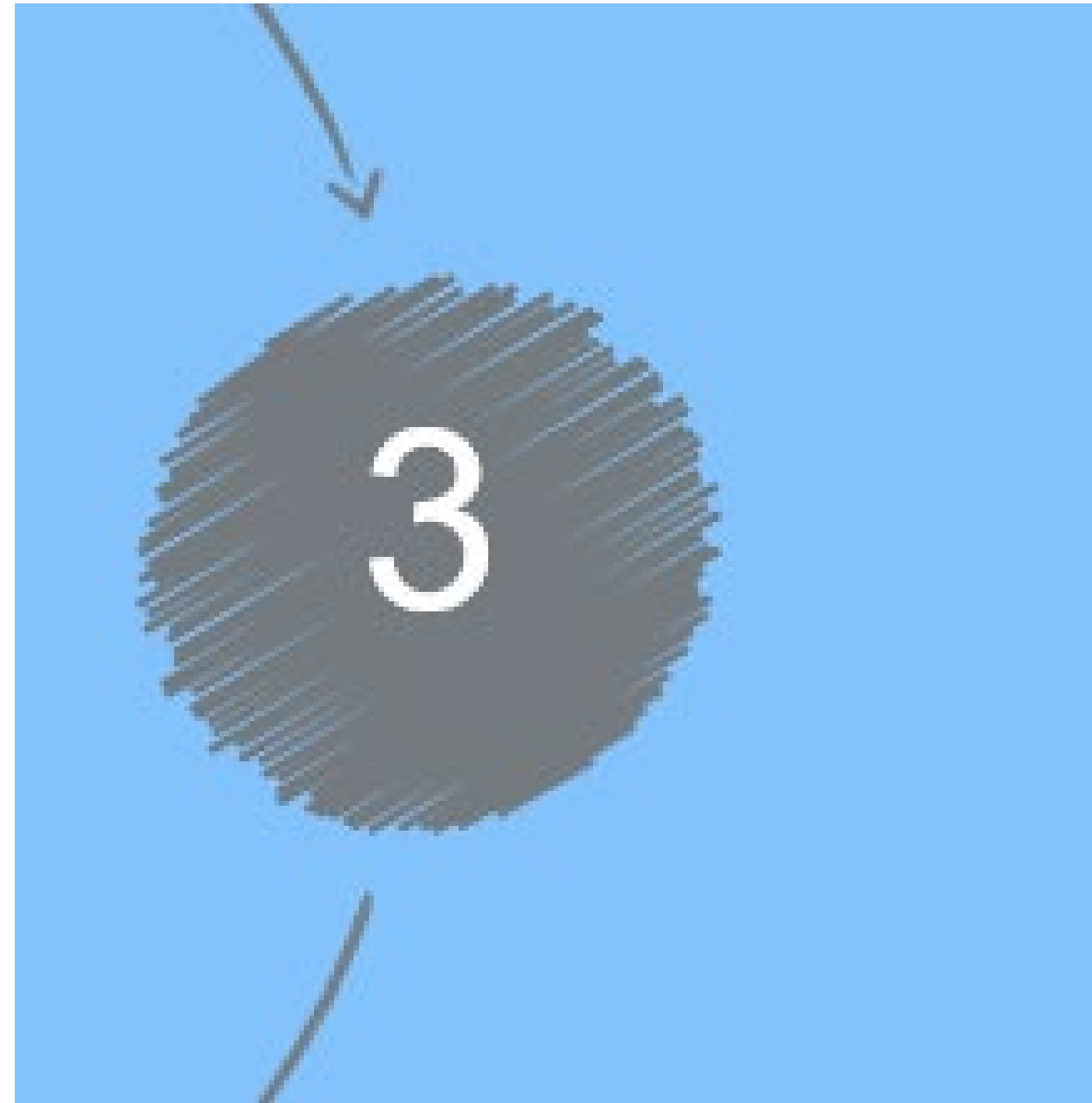


# What You Probably Do

- **Lose information stored in files!**
- **Lose the files themselves!**
- **Keep closed files mixed with active files.**



# What You Could Do



**Enforce updated file and data management policies!**

# File Management Policies

- **Create and enforce consistent filing policies and procedures**
  - **File storage**
  - **File destruction**
- **Include file storage and retention guidelines in fee agreement**
- **Use provision for storing data electronically, too!**

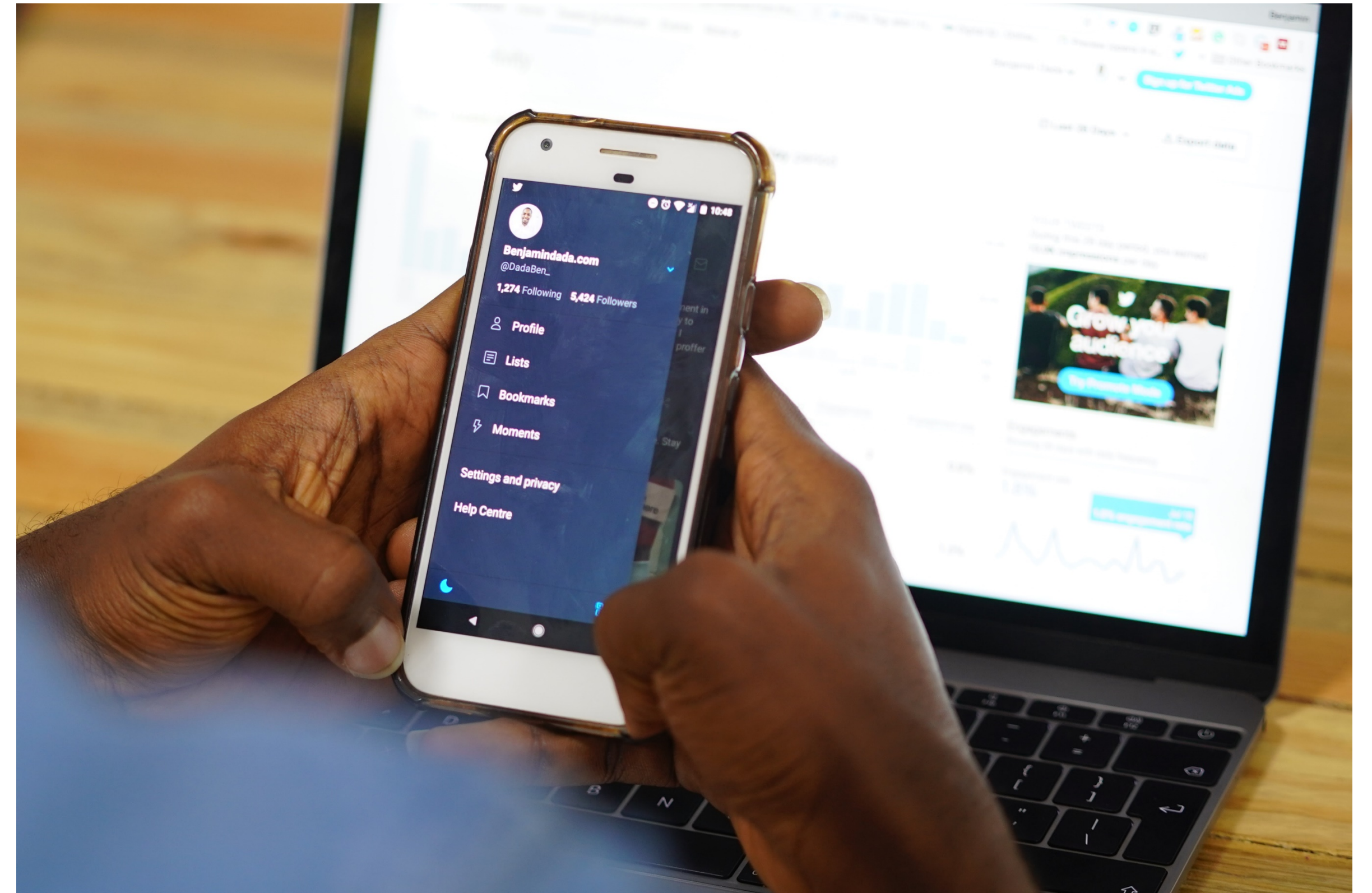


Photo by Benjamin Dada on Unsplash

# www.backupreview.info

## The Top 100 Cloud Backup Companies for January 2020



Unless otherwise indicated, all domains are ".com" websites.

**Note:** Some companies might have products and/or services in 2 or more categories.

#	CONSUMER	SMALL MEDIUM BUSINESS	ENTERPRISE	ENABLERS
01	Carbonite Safe	Arcserve	Databarracks	Asigra
02	Backblaze	Carbonite Server	StorageCraft	Veeam
03	IDrive	Backup-Everything	Code42	Rubrik
04	SpiderOak	IDrive Business	Assured-DP	Novastor
05	SOSOnlineBackup	DataDepositBox	StorageGuardian	Datto
06	Livedrive	CrashPlan	iomart (Backup-Technology)	BaculaSystems
07	Acronis	Keepit.com	HYCU	OwnBackup
08	Sync.com*	CloudOak	Nasuni	Acronis
09	SugarSync*	MSP360	KeepItSafe	CommVault
10	Dropbox*	JungleDisk	UKBackup	Arcserve
11	Box*	ElephantDrive	Geobit	Dell EMC

200

TOP  
25

**backup\_review**  
@backup\_review

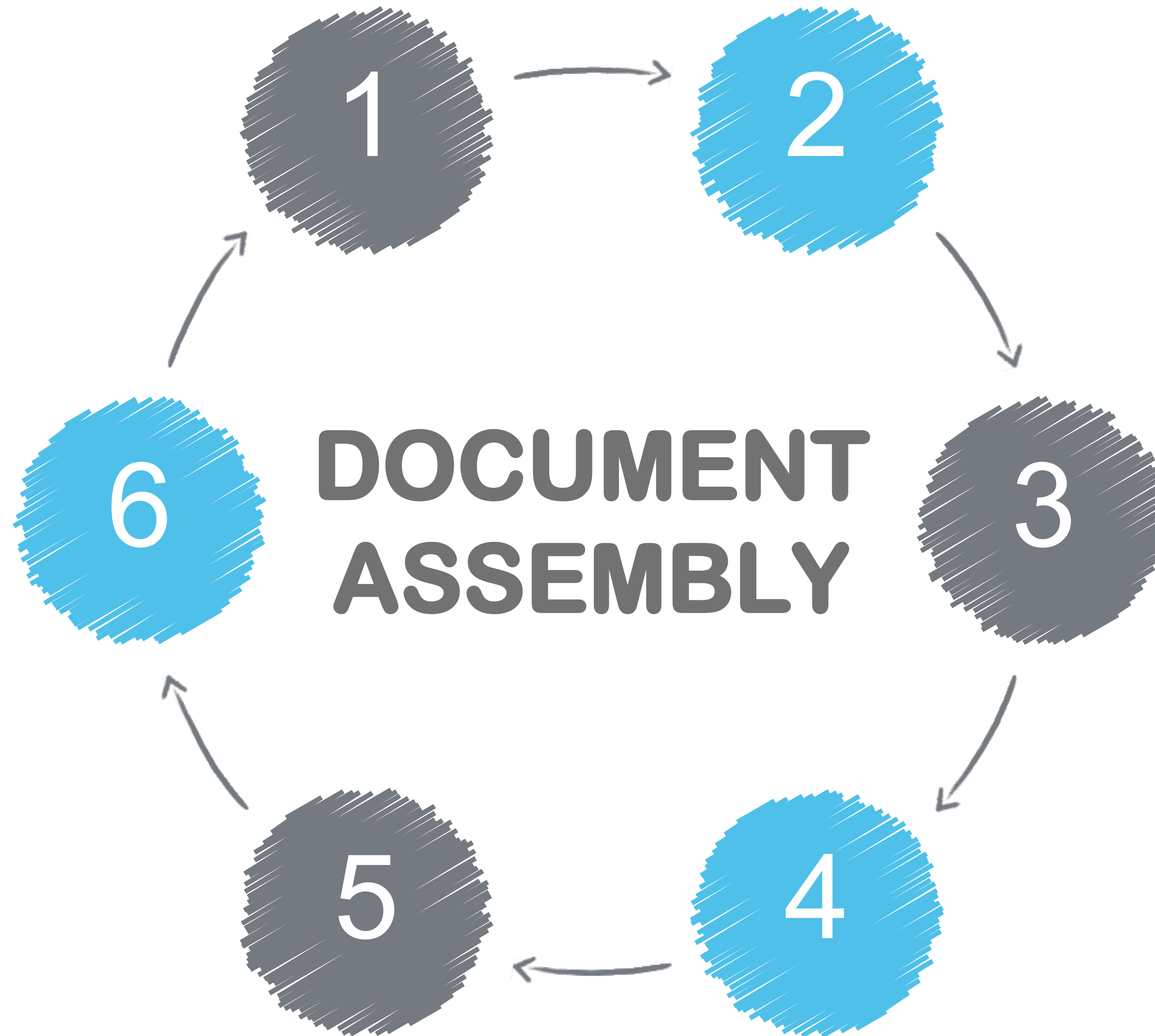
#in : "Edwin Sarmiento to Discuss High Availability (HA) Options for Microsoft SQL Server on Linux" [ift.tt/30OP912](https://ift.tt/30OP912)

[Embed](#)

[View on Twitter](#)

### Most Recent News

- > Wasabi and Quest Software Partner to Deliver Cost-Effective Cloud Storage
- > Acronis Calls on Organizations to Get #CyberFit at Acronis Global Cyber Summit 2020
- > iomart Expands Private Cloud Platform to Support Partner's Growth
- > Novatech Launches New Managed Office Solution
- > Manju Agarwal Joins Board of StorCentric
- > Edwin Sarmiento to Discuss High Availability (HA) Options for Microsoft SQL Server on Linux
- > First Distribution Appointed as the Strategic Pan-African Distributor for ExaGrid



# What You Probably Do

- **Wrestle with typical cut and paste routines for document generation**
- **Spend a lot of time working through versioning, redlining, redacting, and ultimately tinkering with your firm's documents**



Photo by Freshh Connection on Unsplash

# What You Could Do



**Automate document generation from practice managers  
and other doc assembly programs!**

# Automate Document Assembly

- **Use abbreviations and text expanders in standard drafting**
- **Automate signature blocks on smart devices and general documents**
- **Use document assembly in practice managers or standalone systems to make generation easier**
- **Use voice recognition software for drafting**







Search Law Office of Natalie Kelly



Recents ▾

▶ 00:00:00



➕ Create new ▾



Dashboard



Calendar



Tasks



Matters



Contacts



Activities



Bills



Accounts



Documents



Communications



Reports



Integrations



Settings



Help center



**Natalie Kelly**  
Law Office of Nata...



Collapse

Settings > **Text Snippets**

## Text Snippets

ADD

Enable Text Snippets

Filter ▾

Snippet ▾	Expanded Phrase	Whole Word
ach <a href="#">Edit</a> <a href="#">Delete</a>	Attend court hearing	No
amwc <a href="#">Edit</a> <a href="#">Delete</a>	Attend mediation with client	No
emoc <a href="#">Edit</a> <a href="#">Delete</a>	Email to opposing counsel	No
emtc <a href="#">Edit</a> <a href="#">Delete</a>	Email to client	No
lrr <a href="#">Edit</a> <a href="#">Delete</a>	Legal research RE:	No
mwc <a href="#">Edit</a> <a href="#">Delete</a>	Meeting with client	No
ocwc <a href="#">Edit</a> <a href="#">Delete</a>	Office conference with client	No
pcoc <a href="#">Edit</a> <a href="#">Delete</a>	Phone call with opposing counsel	No
ppfh <a href="#">Edit</a> <a href="#">Delete</a>	Prepare for hearing	No
mr	Review and revise	No

Help



FEATURES

PRICING

HAPPY CUSTOMERS

CURRENT SETUP

MORE

LOGIN

TRY FREE

## Fully Integrated

CosmoLex At A Glance

Enterprise-Grade Features

Legal Time & Billing

Law Practice Management

Secure Client Portal

Legal Business Accounts

Trust (IOLTA) Accounts

WATCH AN OVERVIEW

TRY IT FREE

The screenshot shows the Microsoft Word interface with the 'Mailings' tab selected. The ribbon includes options like 'Create', 'Start Mail Merge', 'Select Recipients', 'Edit Recipient List', 'Filter Recipients', 'Write & Insert Fields', 'Preview Results', 'Merge Range', and 'Finish & Merge'. The document content is as follows:

(CosmoLex sample template – Do not edit for firm actual use)

«Firm»  
«Firm\_Addr»

To: [Other Attorney's Name & Address]

Date: «Global\_Today»

RE: My File Number: «Matter\_FileNumber»

Dear [Other Attorney's Name]

Behind this cover page, you will find a copy of the Contract of Sale with respect to the above-referenced matter.

Creating original document templates is an easy process. Simply design your required document once in Microsoft Word, download your database of merge fields (including your custom fields) from CosmoLex, and utilize the basic Microsoft Word "mail merge" function to assemble professional documents.

(CosmoLex sample template – Do not edit for firm actual use)

«Firm»  
«Firm\_Addr»

To: [Other Attorney's Name & Address]

# Use Voice Recognition Tech

- Smartphone dictation
- Desktop dictation
- Virtual Assistance dictation





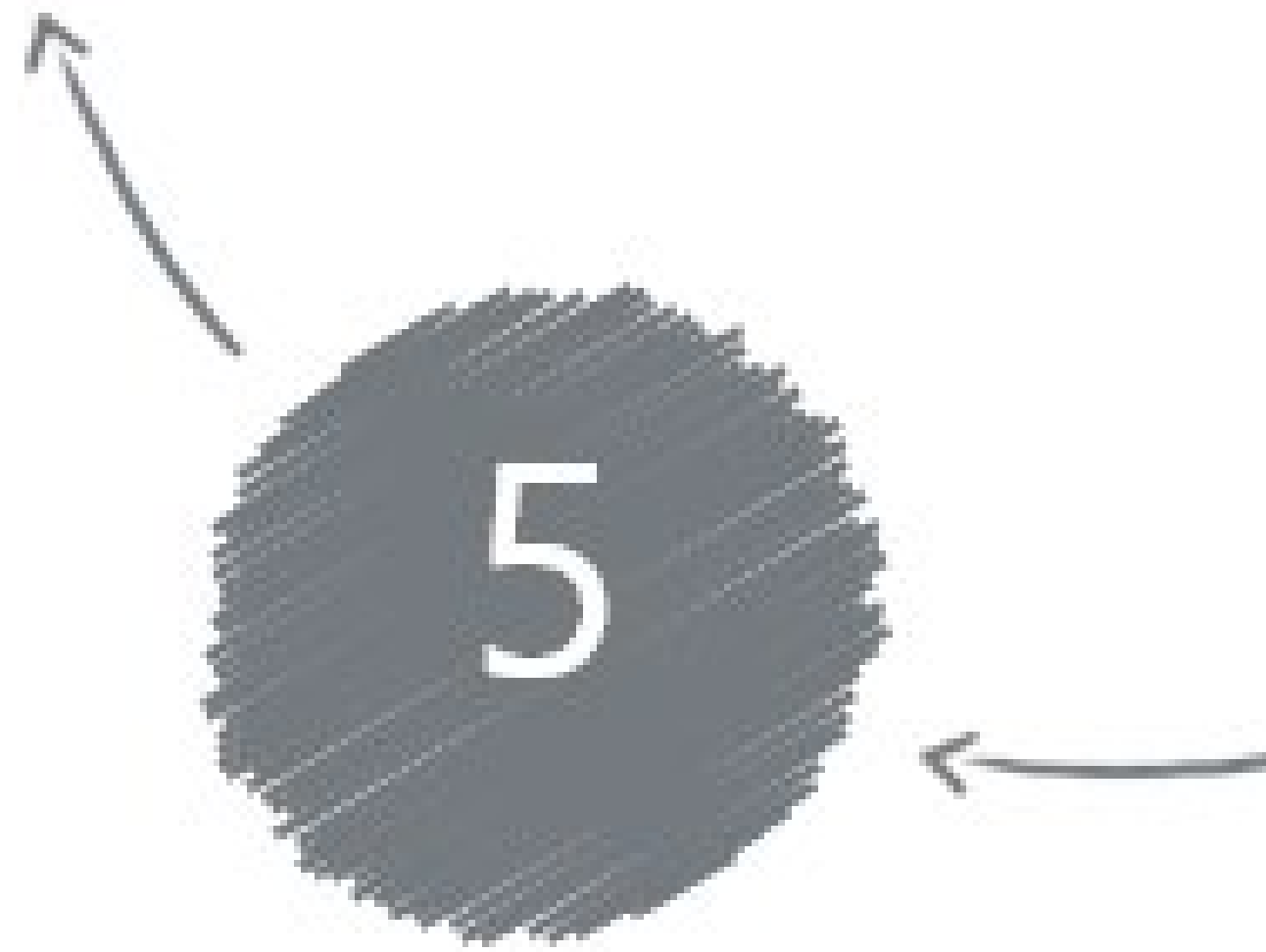
# What You Probably Do

- **Don't track your time simply because you hate doing it!**
- **Create bills from scratch!**
- **Don't create bills at all – at least not regular ones!**
- **Don't do general ledger accounting well or manage data analytics for your firm!**



Photo by Kelly Sikkema on Unsplash

# What You Could Do



**Automate tracking and invoicing for quicker payment  
and better reporting!**

# Updated Time Tracking and Billing

- Use an automated time and billing product or service
  - Time entries from practice management system
  - E-billing functionality and online payment processing
- Use timekeeping apps and online trackers



# MyCase Time Entry

MyCase

What's New | Natalie Kelly | Find c

Home | Calendar | Tasks | Contacts | Cases | Documents | Billing | Reporting

Dashboard | Recent Activity

New Appointment | New Document

Add Contact | Add Case

### Recent Activity

- Natalie Kelly (Attorney) added case M 10 days ago via web | Case link: Maggie Trav
- Natalie Kelly (Attorney) added contact 10 days ago via web
- Natalie Kelly (Attorney) added a note f 10 days ago via web | Case link: Gates v. Ga
- Natalie Kelly (Attorney) added Invoice 3 months ago via web | Case link: dan smith
- Natalie Kelly (Attorney) added a time entry for Client Meeting 3 months ago via web | Case link: dan smith

## New Time Entry

Case Link  [Browse All](#)

User

Activity  [Add New Activity](#)

Non-billable  This time entry is non-billable

Description   
This description will appear on invoices

Date	Rate	Duration
<input type="text" value="11/14/2014"/>	\$ <input type="text"/> /hr. <input type="text"/>	<input type="text"/> <small>0.1 = 6 minutes</small>

[Save and New](#) [Save and Close](#)

ctrl+Enter to Save and New

[Schedule a Webinar one-](#)



# Clio Expense Entry

Search Law Office of Natalie Kelly

Recents

00:00:00

Create new

Dashboard

Calendar

Tasks

Matters

Contacts

Activities

Bills

Accounts

Documents

Communications

Reports

Integrations

Settings

Help center

## Activities

Manage categories

New time entry

New expense

All

\$

01/21/2020

01/21/2020

Filter by keyword

Columns

Filters

Rate (\$)

Non-billab

### New expense entry

Expense category

Copies

Quantity	Rate	Required	Total amount
25.00	\$ 0.75	<input checked="" type="checkbox"/>	\$ 18.75

Description

Copies for matter.

Matter

00005-Dale

Date

01/21/2020

Firm user

Natalie Kelly

1

Save entry

Save and create another

Save and duplicate

Cancel

Natalie Kelly  
Law Office of Nata...

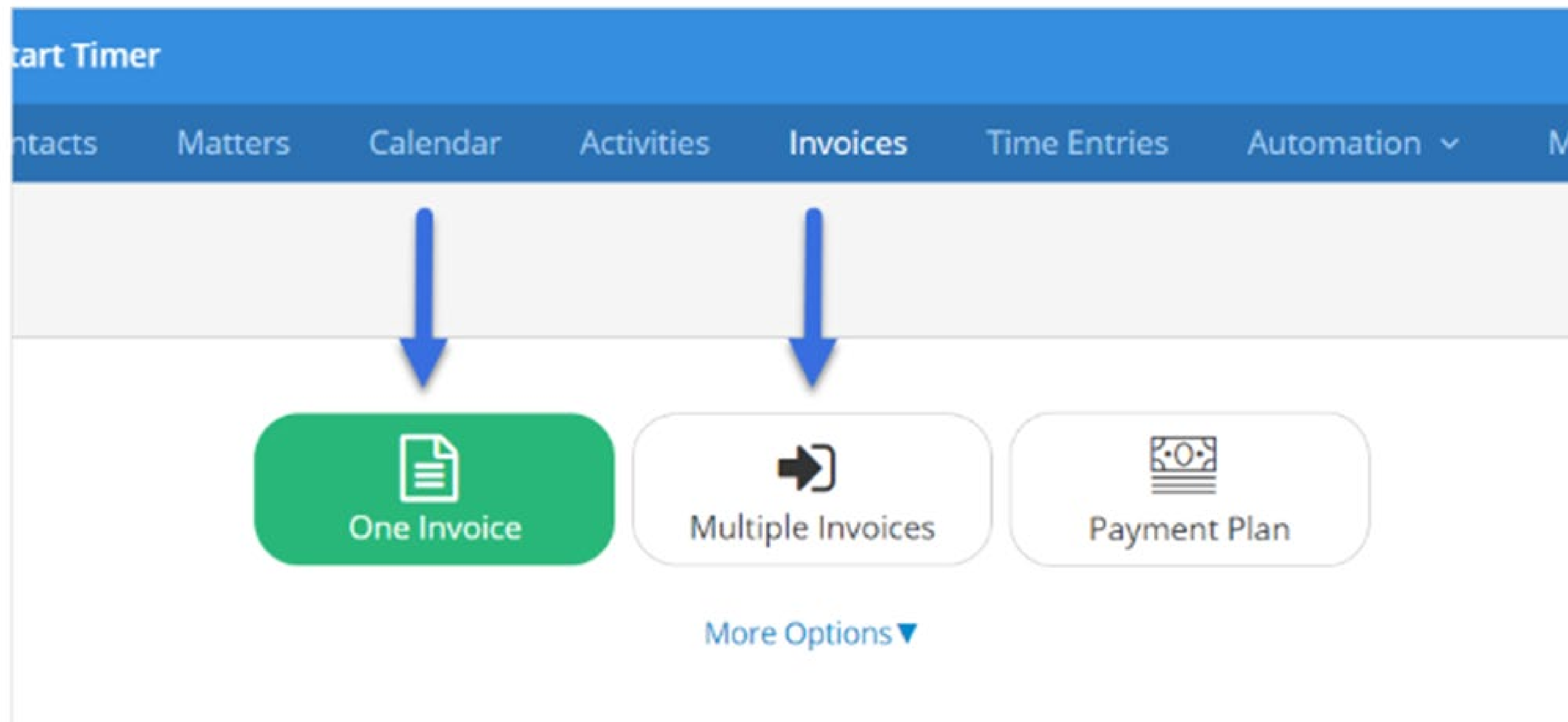
Collapse

Help

# Directions for Practice Panther Invoices

Create an invoice

Click the '+New' button on the top left of the software and select 'Invoice'. Select 'One Invoice' or 'Multiple Invoices' to generate multiple bills in 1 click.



# Cosmolex Sample Invoice

ALSO ADMITTED IN CA, NV, and OR

**Richard J. Pavlik**  
ATTORNEY AT LAW  
1313 Mocking Bird Lane  
Los Angeles, California 90001-1964

support@cosmolex.com  
P: 732-595-9015  
F: 365-804-0050

Jun 22, 2018

[Click Here To Pay This Invoice Using Credit Card](#)

**Bill To:**

Benny Franks  
2676 Ingram Road  
Elkin, NC 28621

**Date:** Jun 07, 2018

**Invoice #:** 47

**Matter:** Municipal Court

**Due Date:** Jul 07, 2018

**Balance Forward**

**\$7,000.00**

**Professional Services**

Date		Details	Hours	Rate	Amount
Nov 06, 2017	RJP	Bankruptcy Notice of Claim for Bankruptcy	1.00	\$0.00	\$0.00
Nov 15, 2017	RJP	Appear Surrogate's Court Appear in Surrogates Court to Probate Will	2.15	\$200.00	\$430.00
Dec 26, 2017	RJP	Modification of Agreement Modification of Agreement		\$0.00	\$0.00
May 17, 2018	RJP	Depositions 1 Prepare Order to Take Depositions	2.45	\$200.00	\$490.00
May 17, 2018	RJP	Motion Prepare and File Motion	2.90	\$200.00	\$580.00

For professional services rendered 8.50 \$1,500.00

- Link for client to pay by credit card
- Option for showing timekeeper with time spent, rates and amounts
- Multiple invoice templates



# What You Probably Do

- Insist on continuing to do things the way you have always done them
- Fail to take the time to review office policies and procedures regularly
- Waste time and money by not addressing office inefficiencies



Photo from Law.com as featured in Daily Report – March 27, 2015

Woodrow Wilson's Office Replica in my office's lobby at the State Bar of Georgia Headquarters – only 40 short steps from my desk!

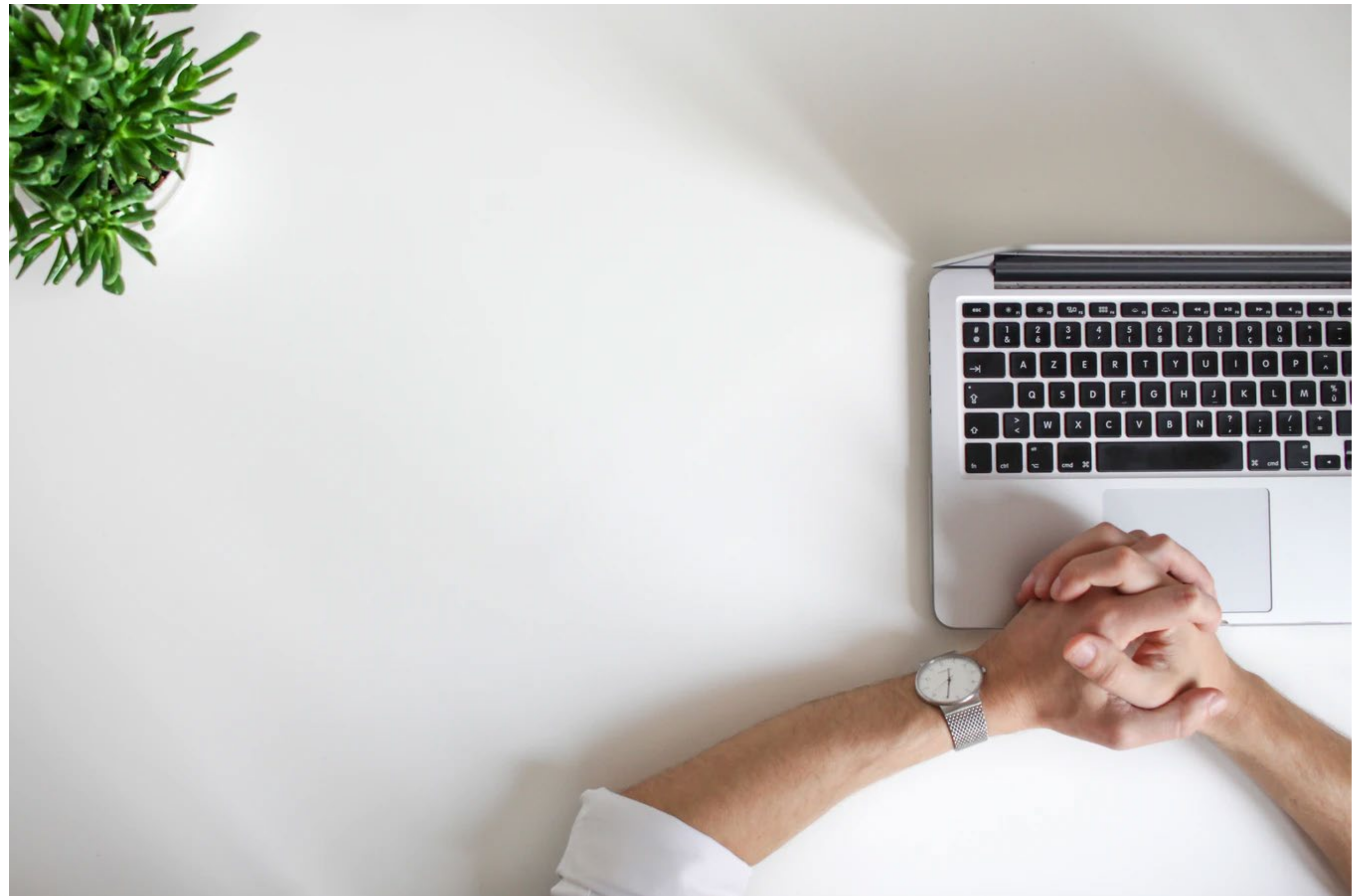
# What You Could Do

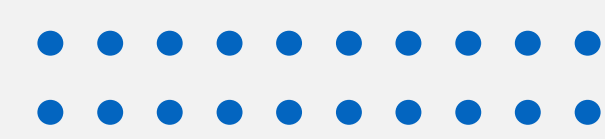


**Update technology with refined policies and procedures to move to more efficiency in work production.**

# What You Could Do

- **Ensure you have updated policies and procedures**
- **Contact your Mass LOMAP staff for assistance**





# What You Should Do

- **Do a “Take Home” assignment for updating your systems and procedures to become more productive AND efficient, today!**

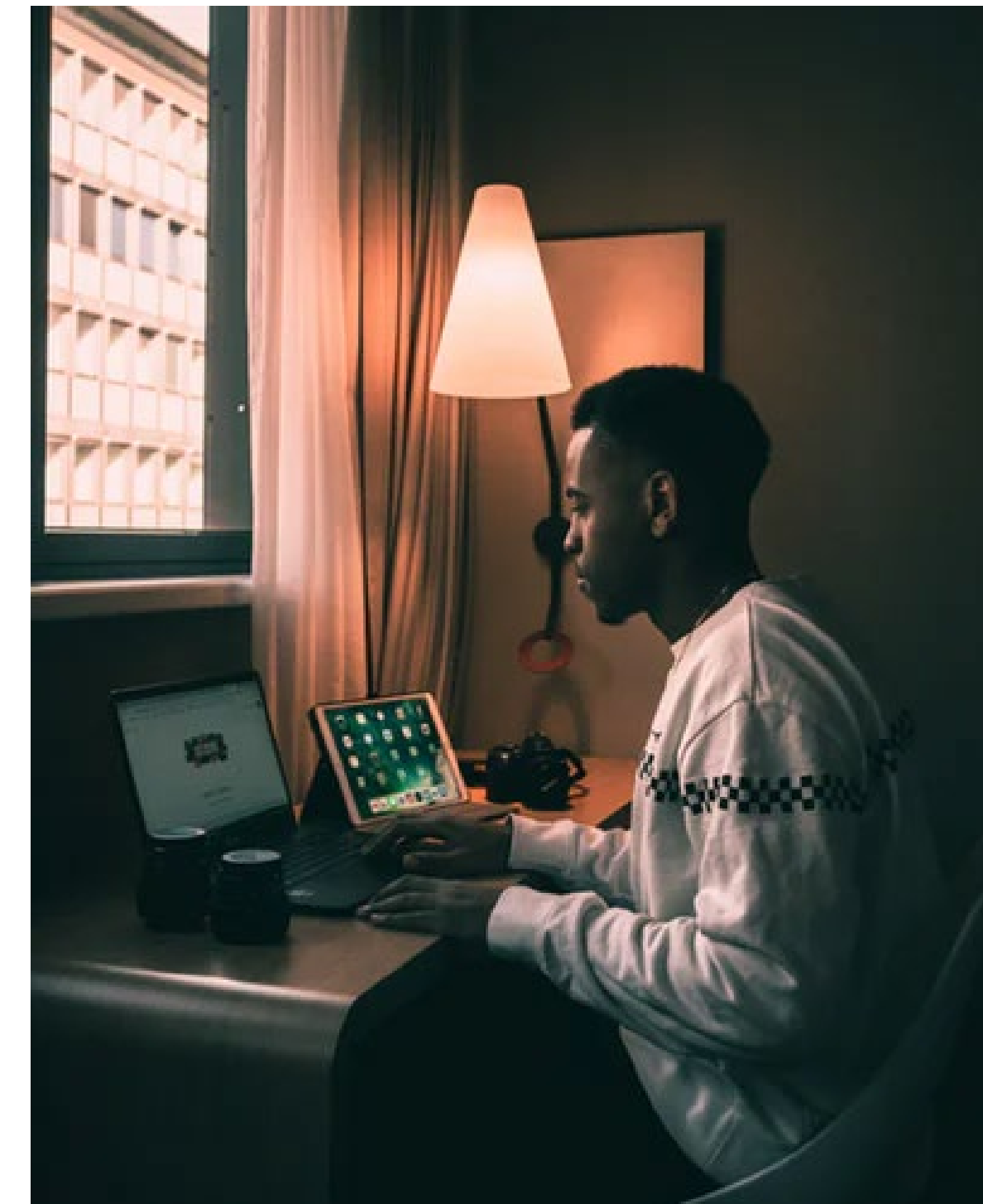


Photo by Collins Lesulie on Unsplash



**Q & A**

**THANK YOU!!!**

**Natalie Kelly**

**[NatalieK@gabar.org](mailto:NatalieK@gabar.org)**

**404-527-8770**

**Twitter: @NatalieRKelly**

**Blog: Georgia Practice Advisor**

**[www.gappracticeadvisor.com](http://www.gappracticeadvisor.com)**