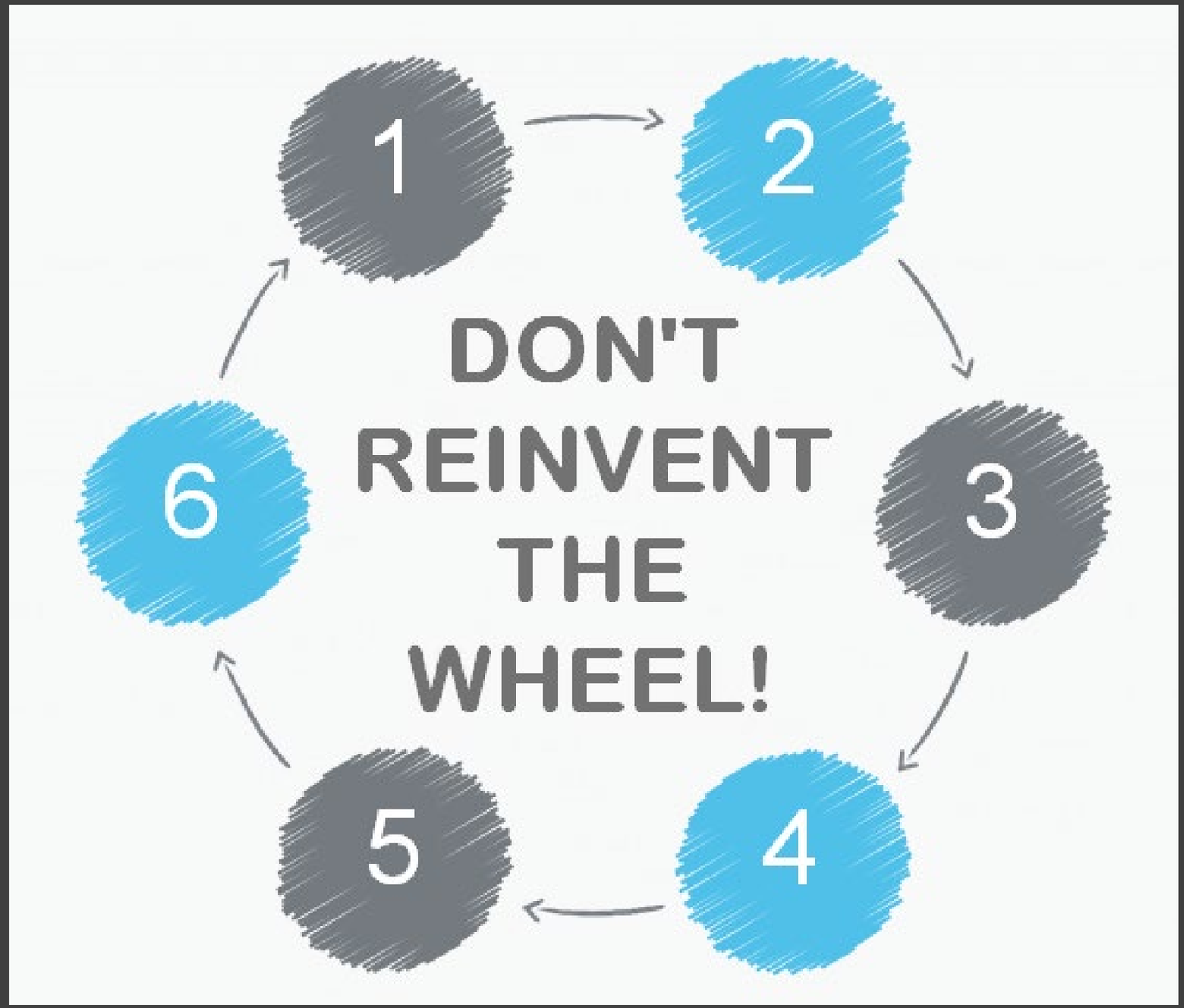
Technology Solutions for Common Law Practice Productivity Problems

January 22, 2020

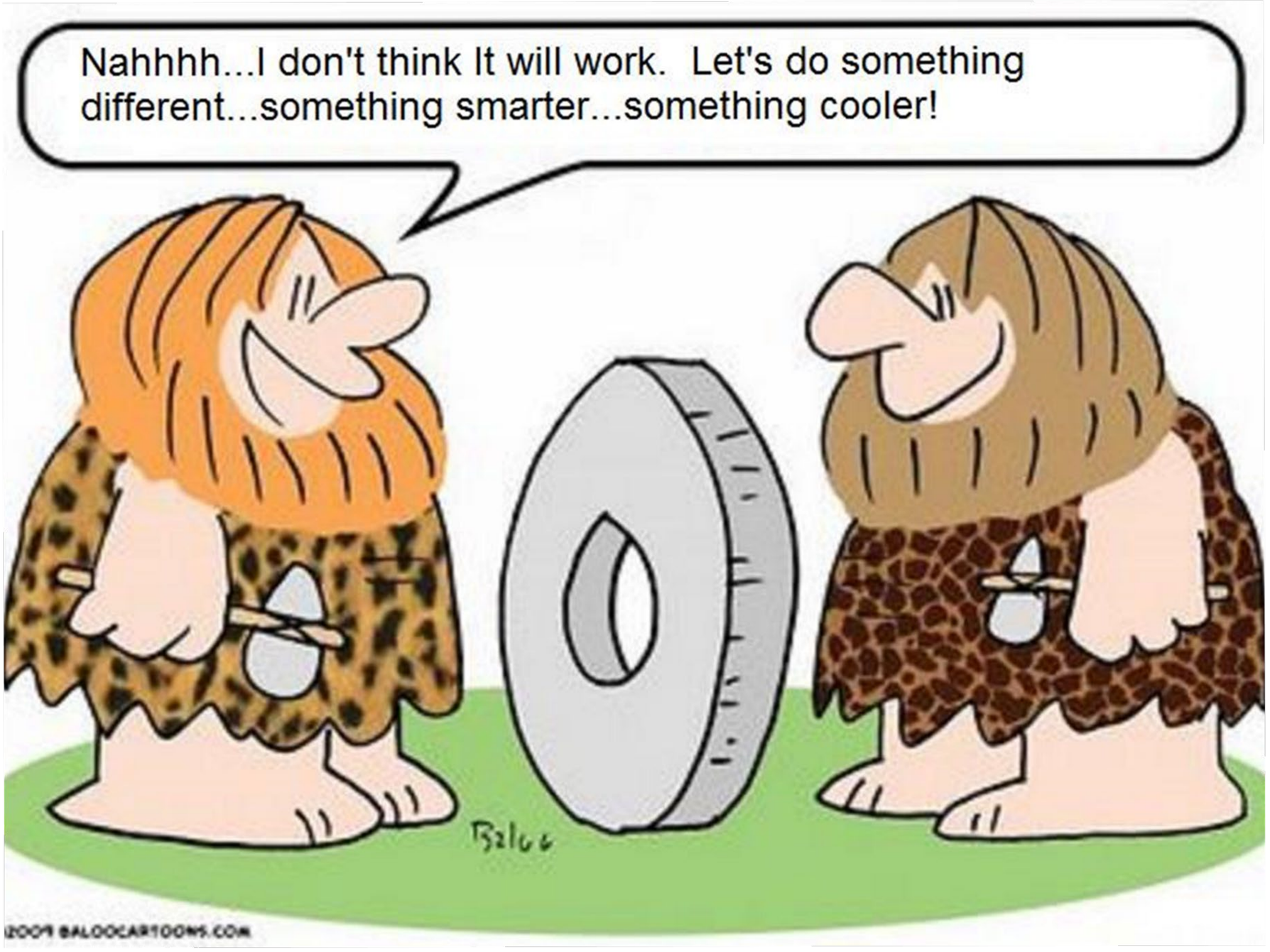
Webinars for Busy Lawyers
Mass LOMAP



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

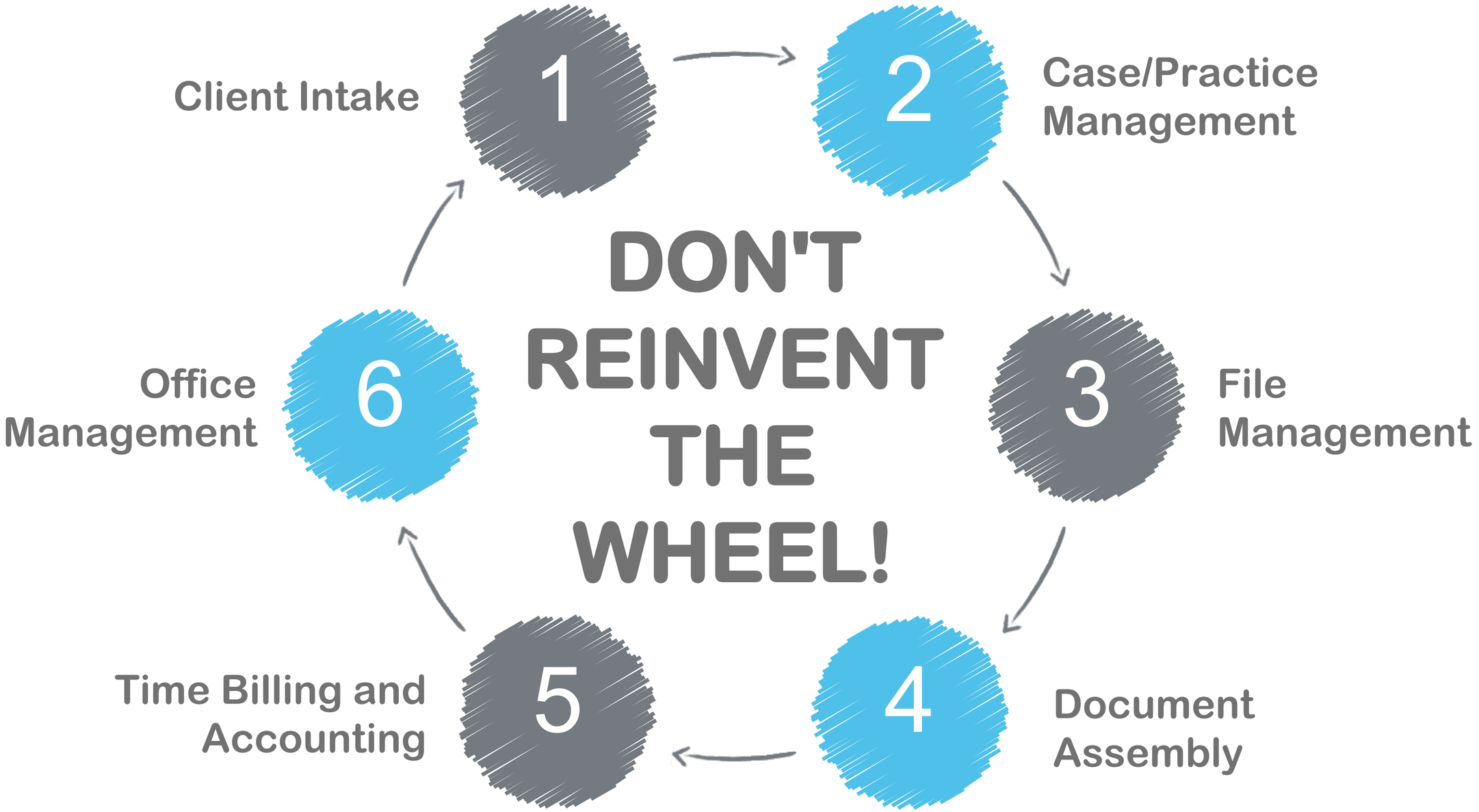

Nahhhh...I don't think It will work. Let's do something different...something smarter...something cooler!
BALOO
2009 BALOOCARTOONS.COM

TODAY’S AGENDA

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

Photo by Nathan Dumlao on Unsplash

Productivity vs. Efficiency


Client Intake
1
2
Case/Practice Management
DON'T REINVENT THE WHEEL!
Office Management
6
3
File Management
Time Billing and Accounting
5
4
Document Assembly

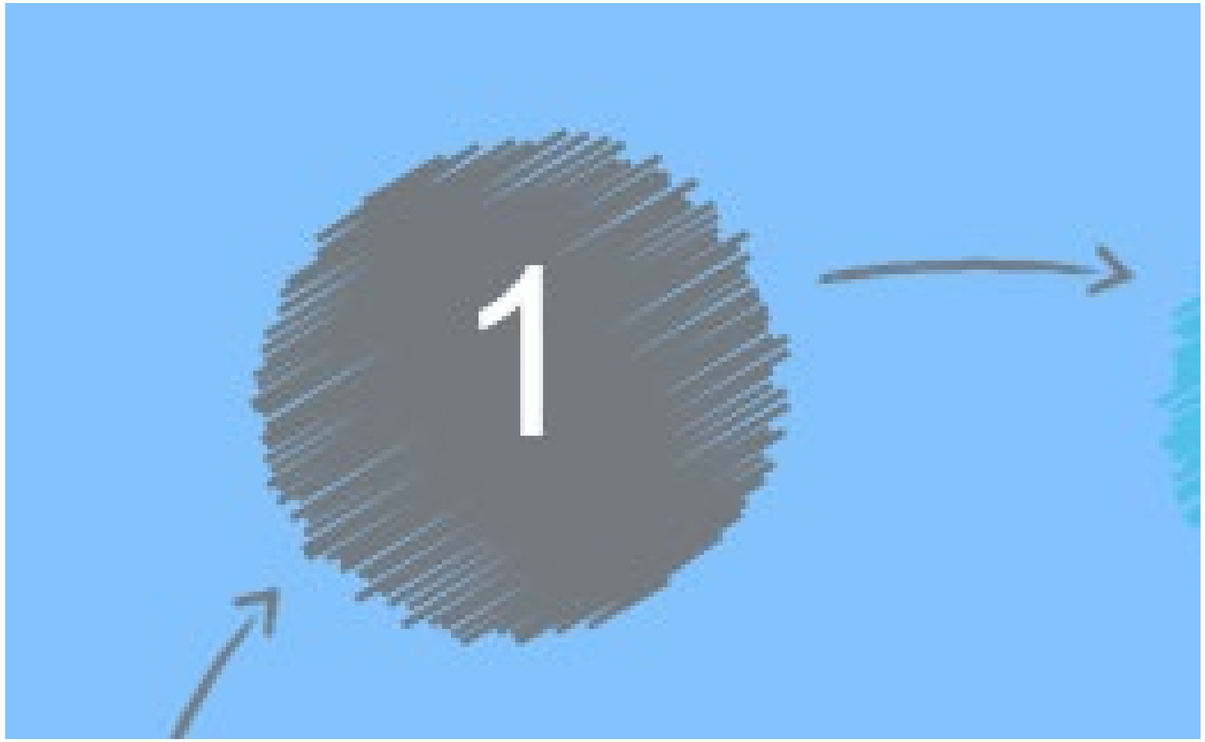
1
2
3
4
5
6
CLIENT
INTAKE

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

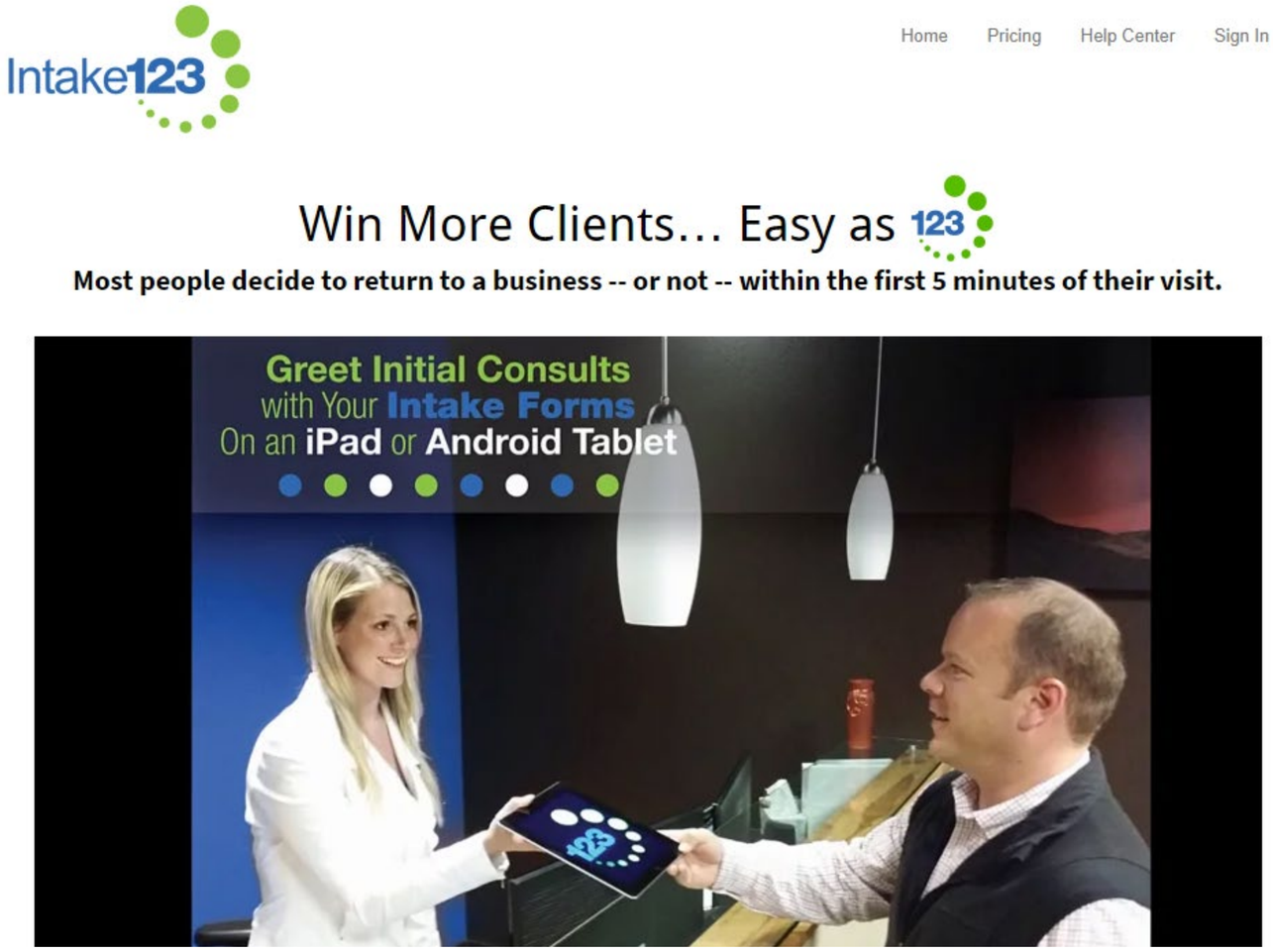
Photo by Nik MacMillan on Unsplash

What You Could Do

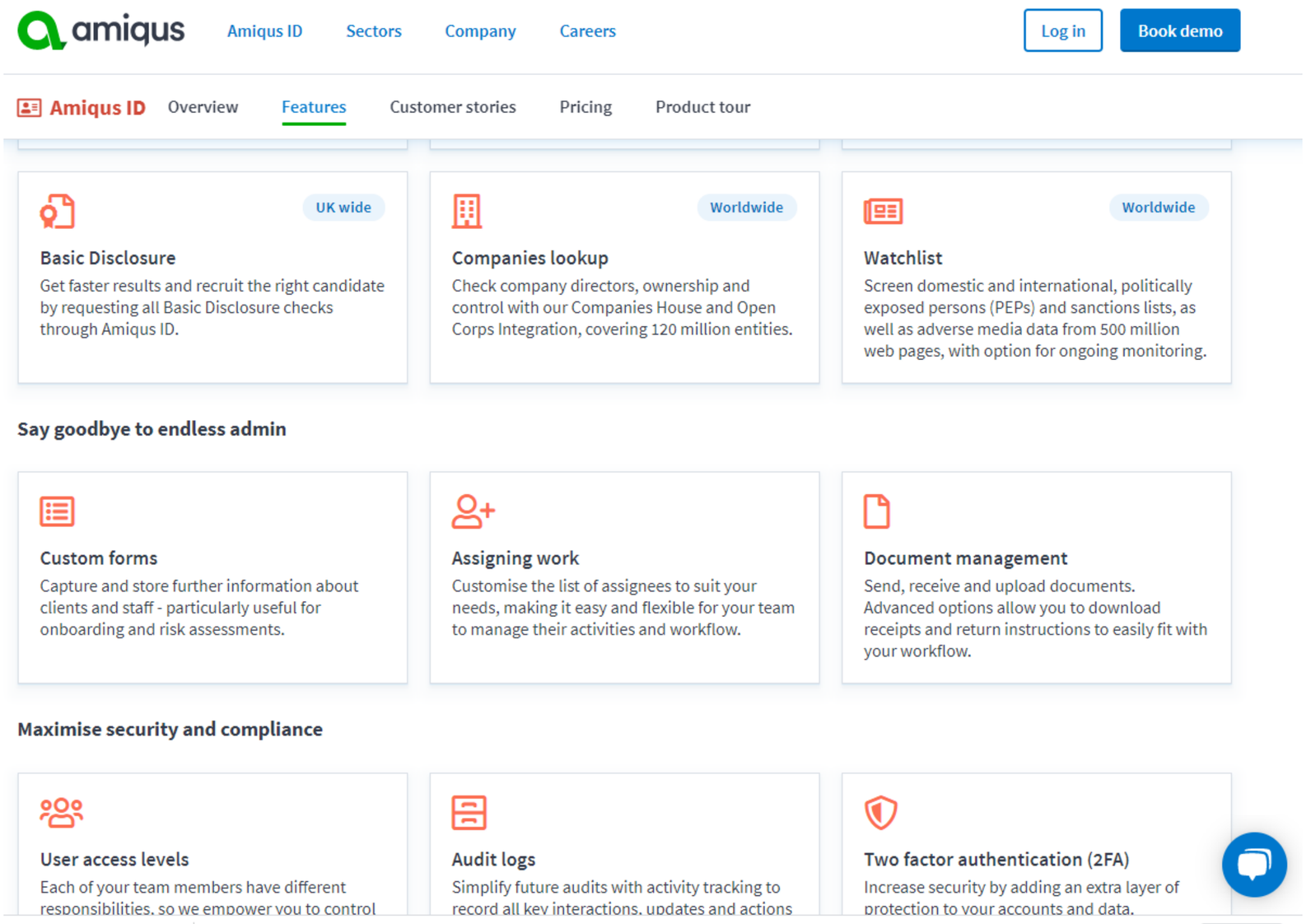


Automate your intake process!

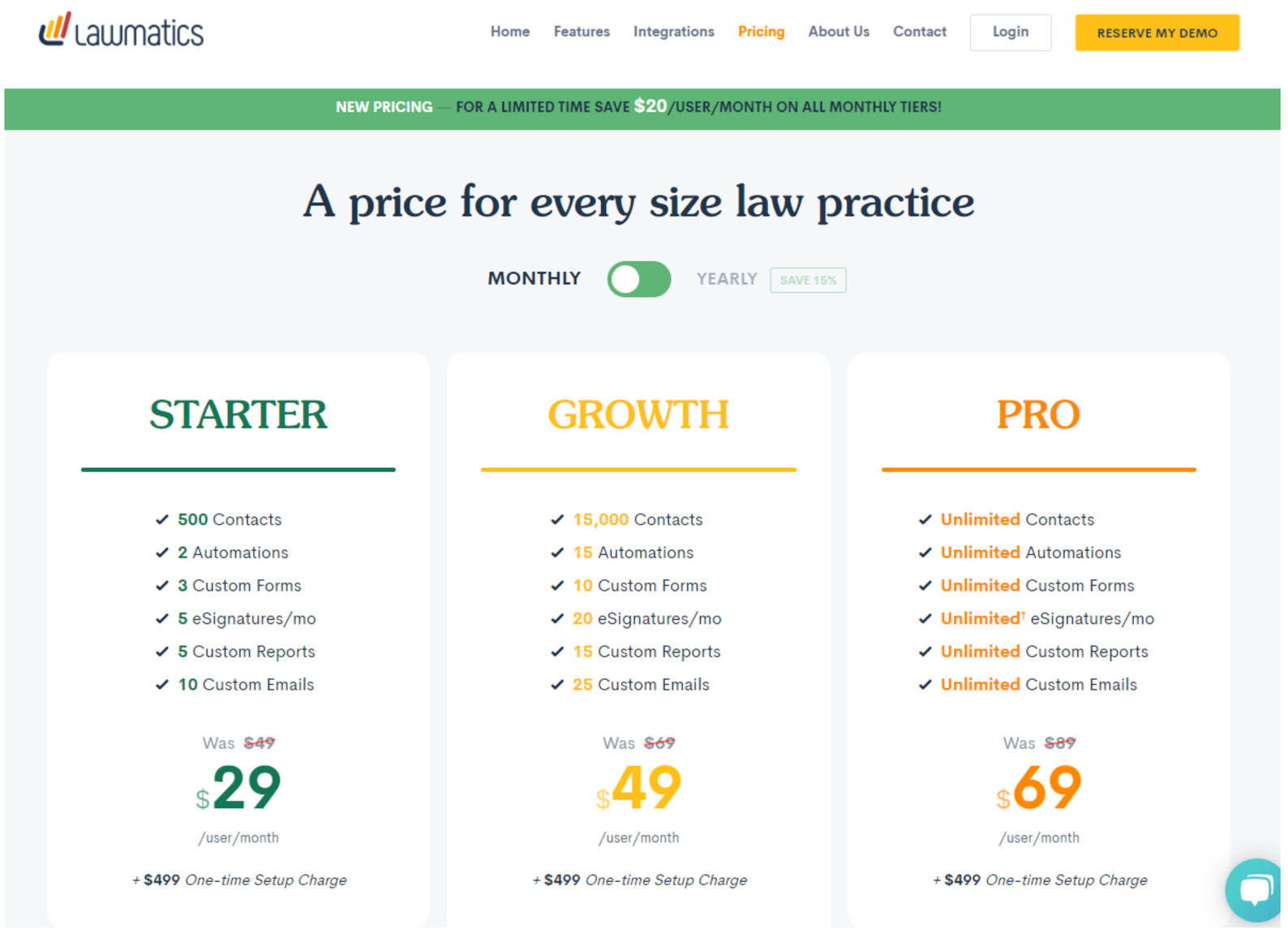
Use standalone intake systems



Consider compliance-checking systems



Review features and pricing



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.

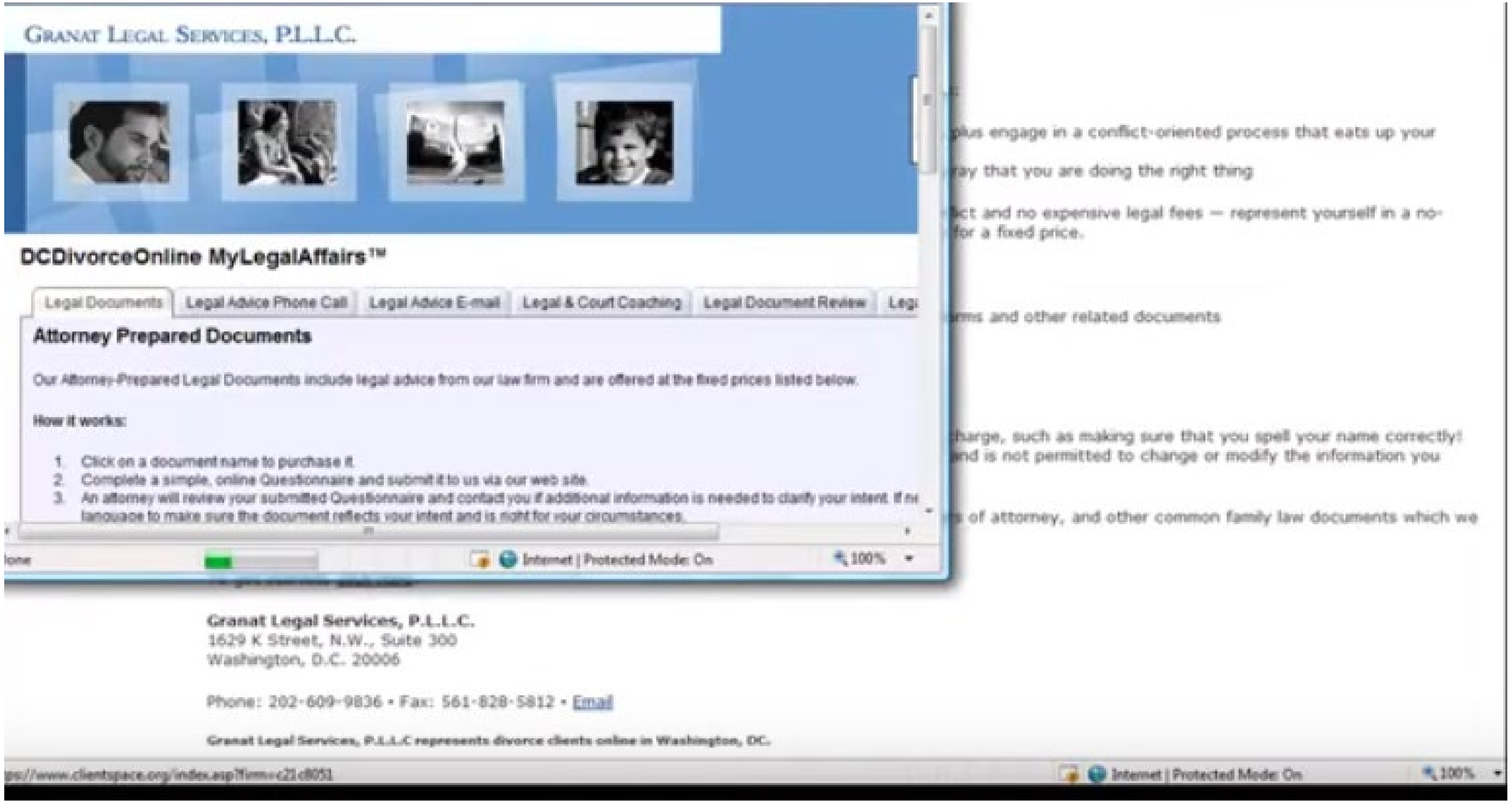
Document Templates. When it comes to intake questionnaires or engagement letters, a template can help get you up and running with your software more easily.

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

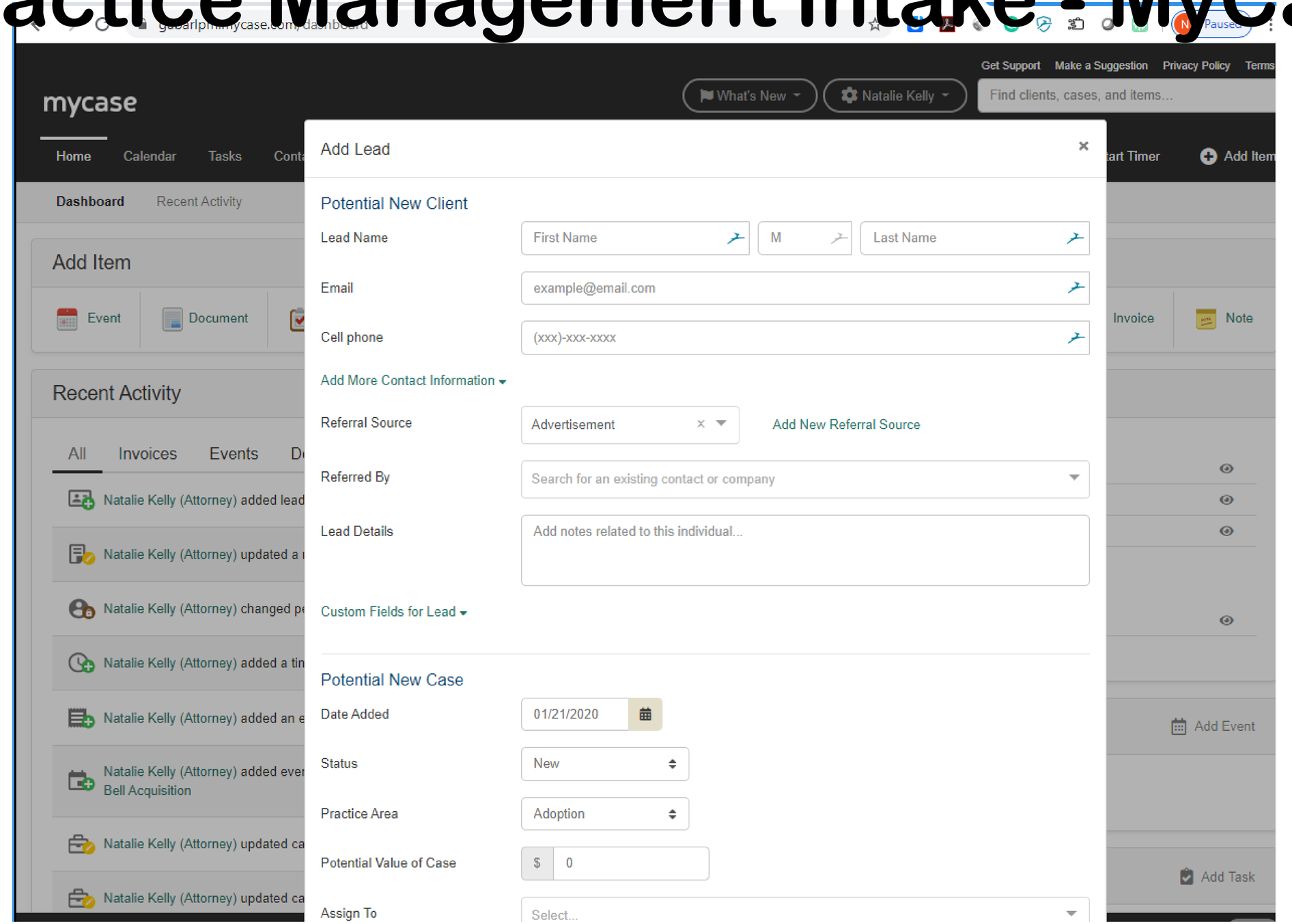
Analytics. See reports like the number of clients in each stage of your marketing or intake process, or the return on investment from your various marketing investments.

Page edited by the Lawyerist editorial team. Last updated December 3rd, 2019.

Client Portal Intake - DirectLaw



Practice Management Intake - MyCase



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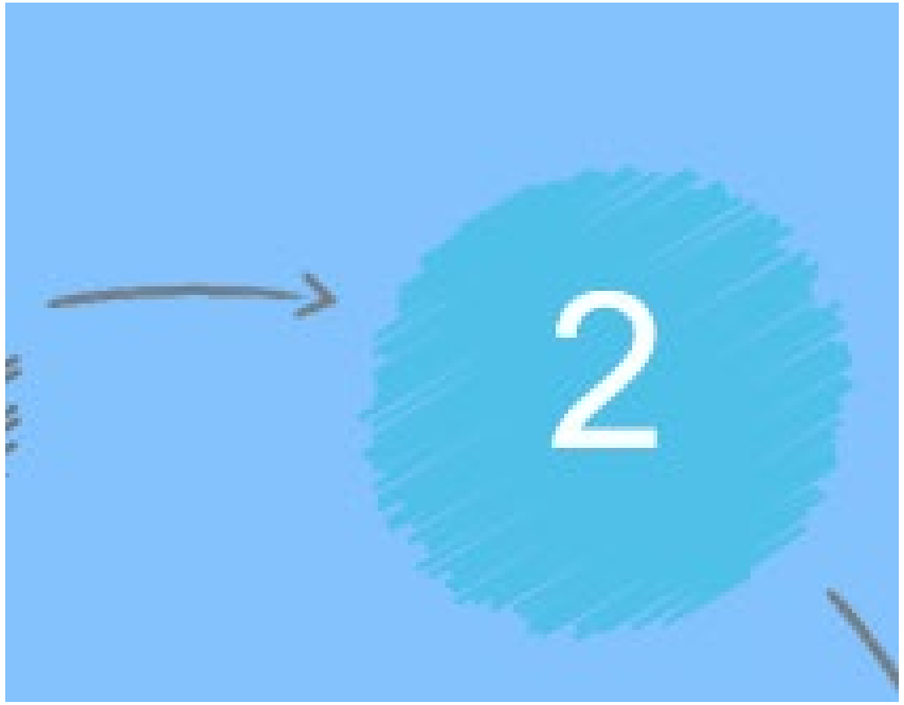
CASE/
PRACTICE
MANAGEMENT

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

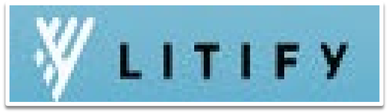
Photo by Sebastian Herrmann on Unsplash

What You Could Do



Use a practice management system in your practice!

Practice Management Options



Futuristic Practice Management Options

OMNI LEGAL

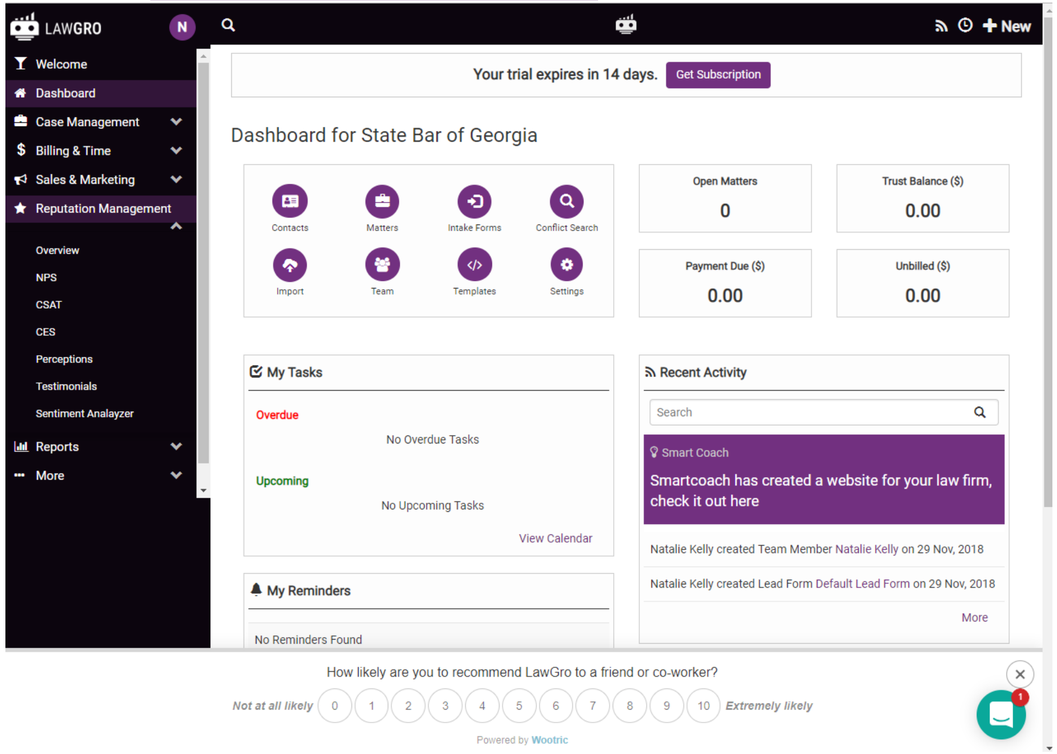
DESIGNED WITH YOU IN MIND

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:

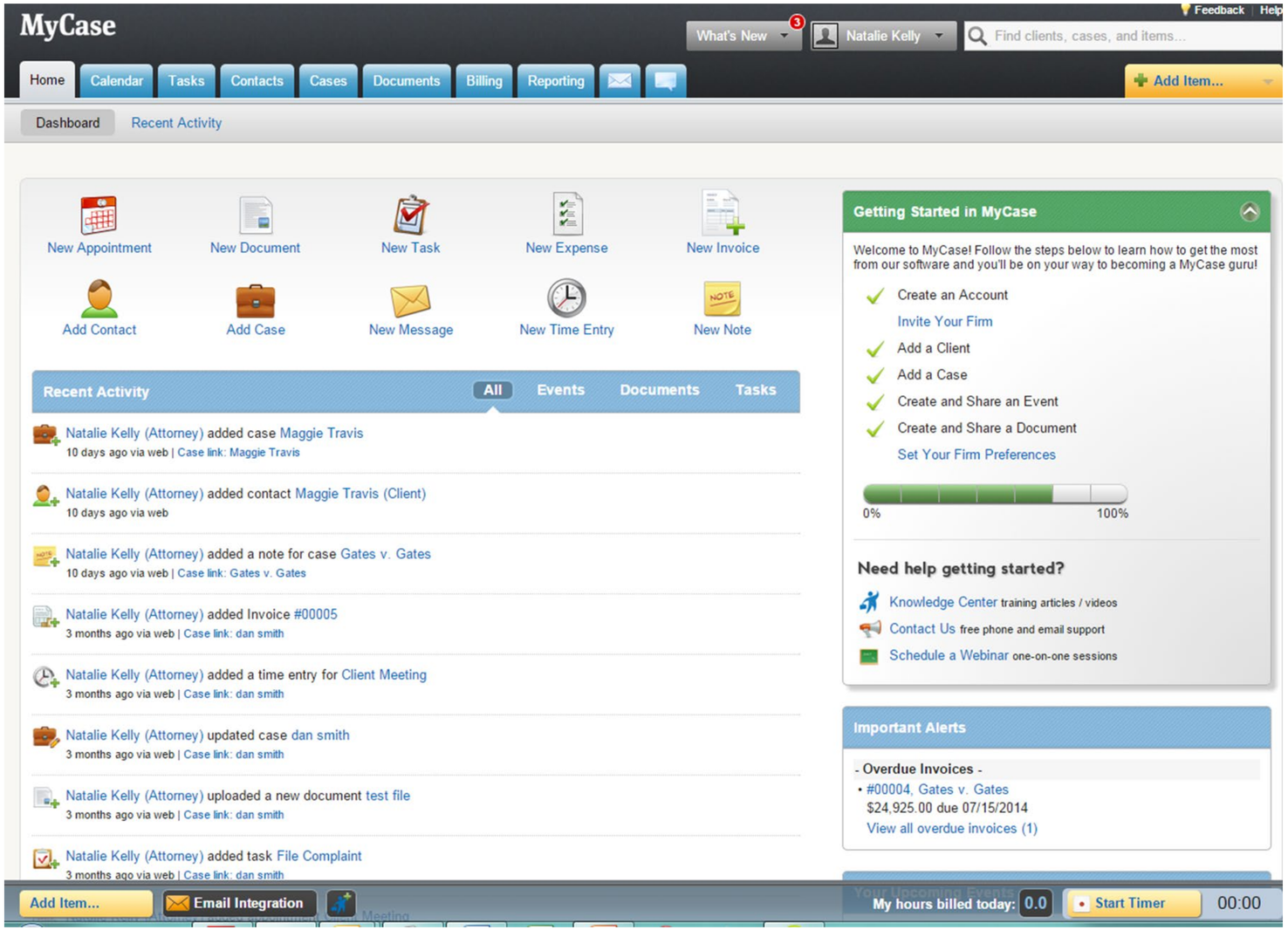
- Deep data integration that fuels AI processing
- Agile process design that powers customizable workflows
- Smart conditions that automate team progress
- AI pattern recognition that drives best practices development
- Outcome prediction that improves efficiency and reduces bottlenecks
- Collaborative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

LAWGRO

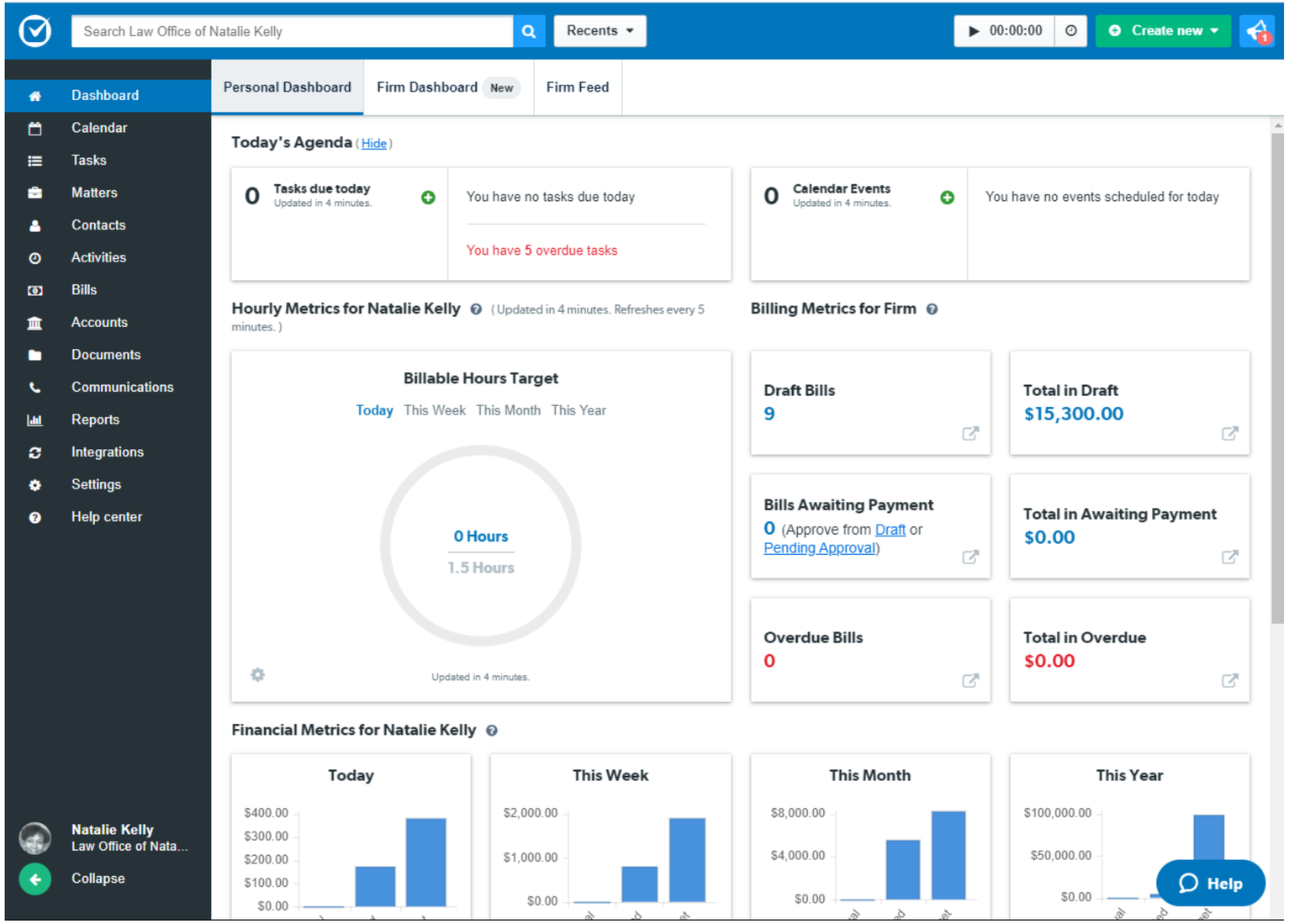


Immigration- Specific Practice Management Solutions

- 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 communi-cations – 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



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FILE
MANAGEMENT

What You Probably Do

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

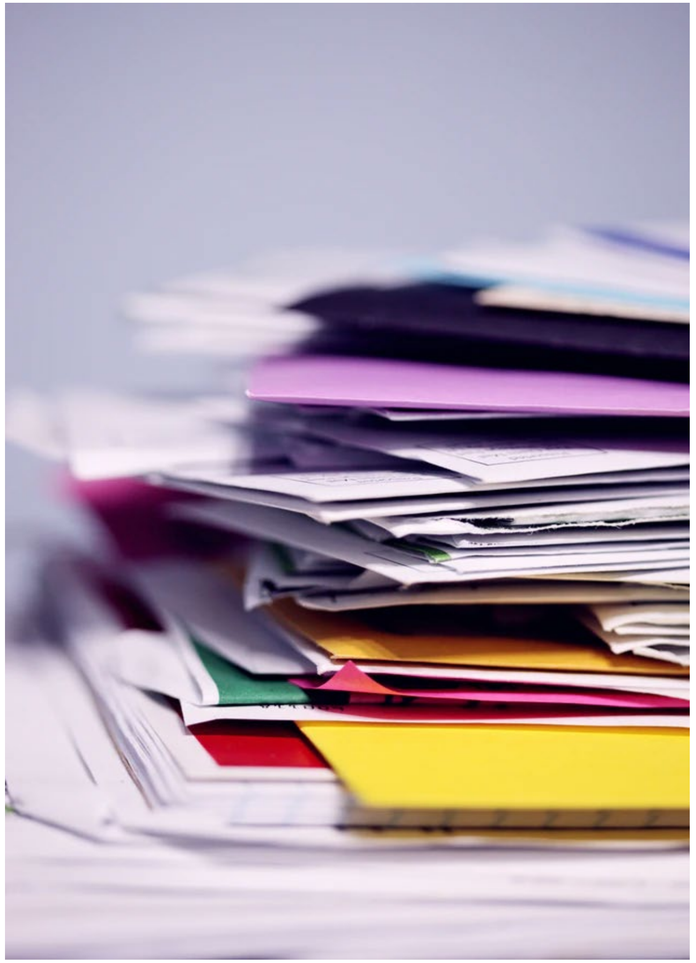
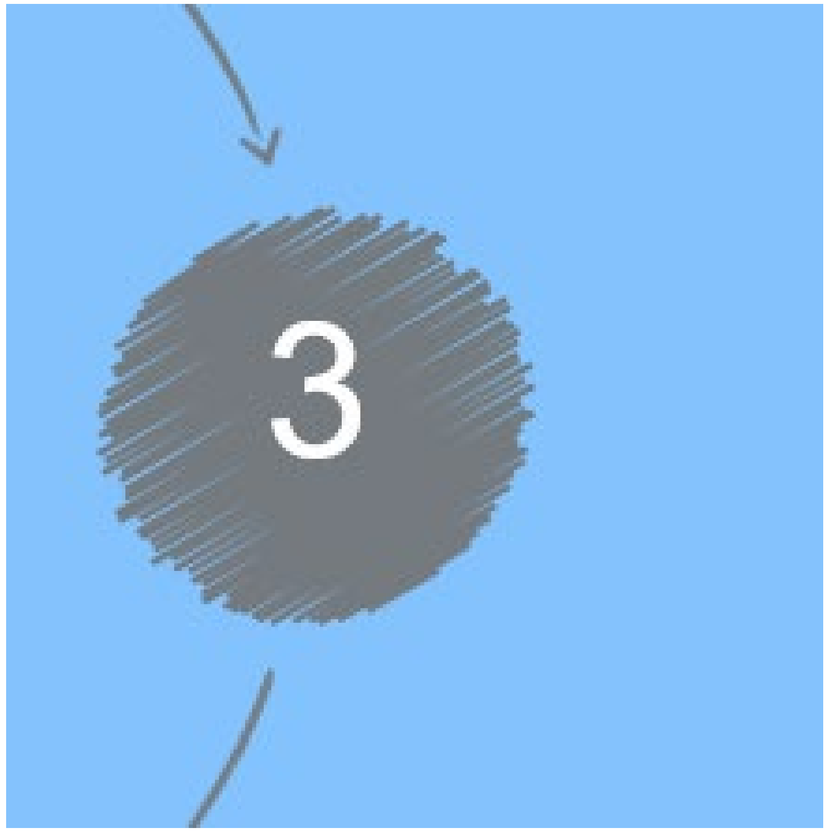


Photo by Sharon McCutcheon on Unsplash

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!

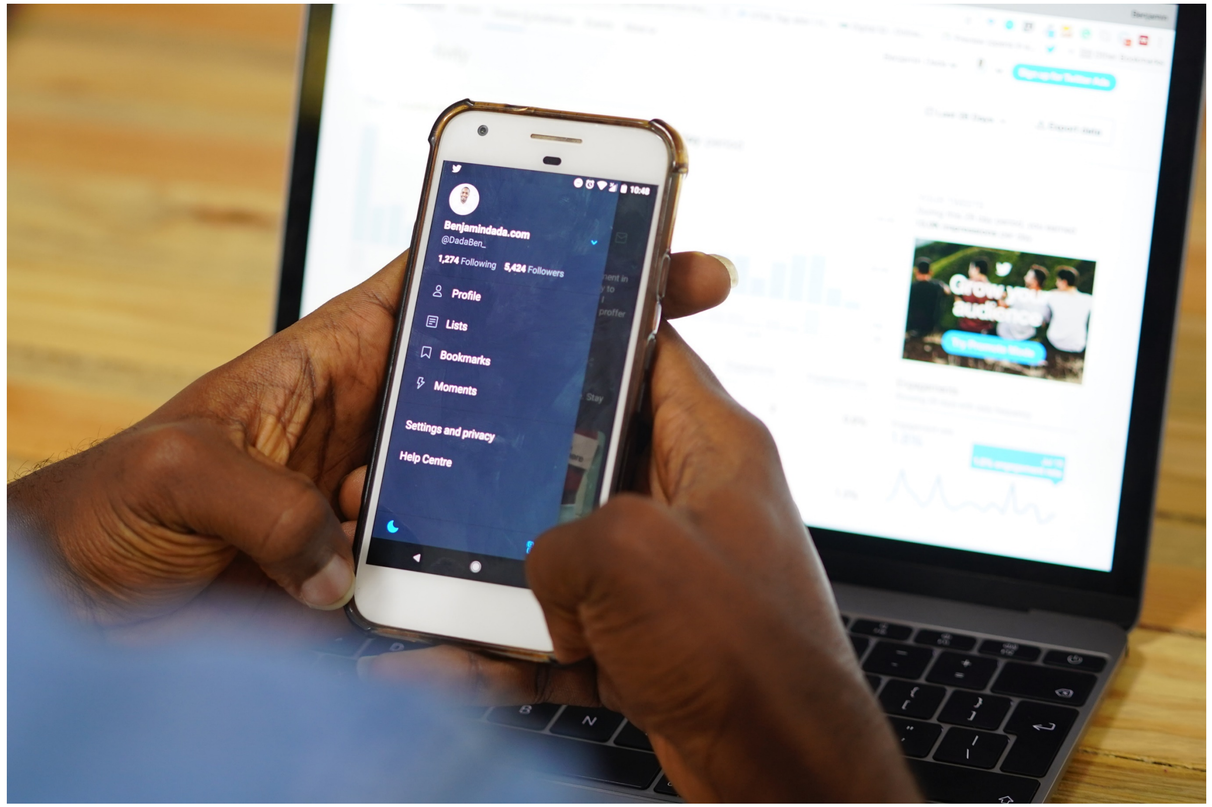


Photo by Benjamin Dada on Unsplash

www.backupreview.info

The Top 100 Cloud Backup Companies for January 2020

Backup Review
Helping you choose the right backup solution

Unless otherwise indicated, all domains are "dot 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	Cohesity	Dell EMC

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backup_review
@backup_review

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

Embed View on Twitter

Most Recent News

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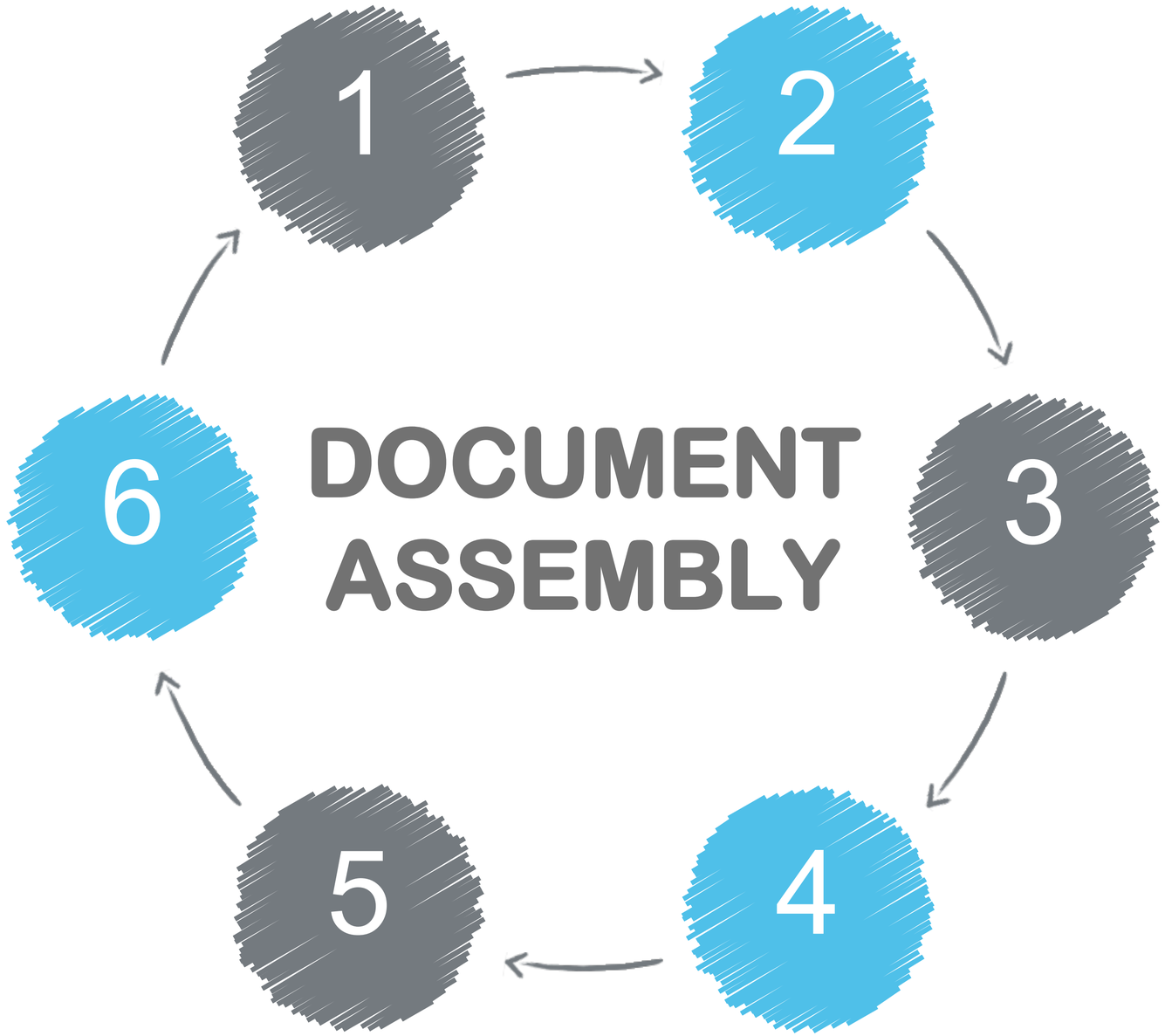
- Manju Agarwal Joins Board of StorCentric
- Edwin Sarmiento to Discuss High Availability (HA) Options for Microsoft SQL Server on Linux
- First Distribution Appointed as the Strategic Pan-African Distributor for ExaGrid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DOCUMENT ASSEMBLY

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

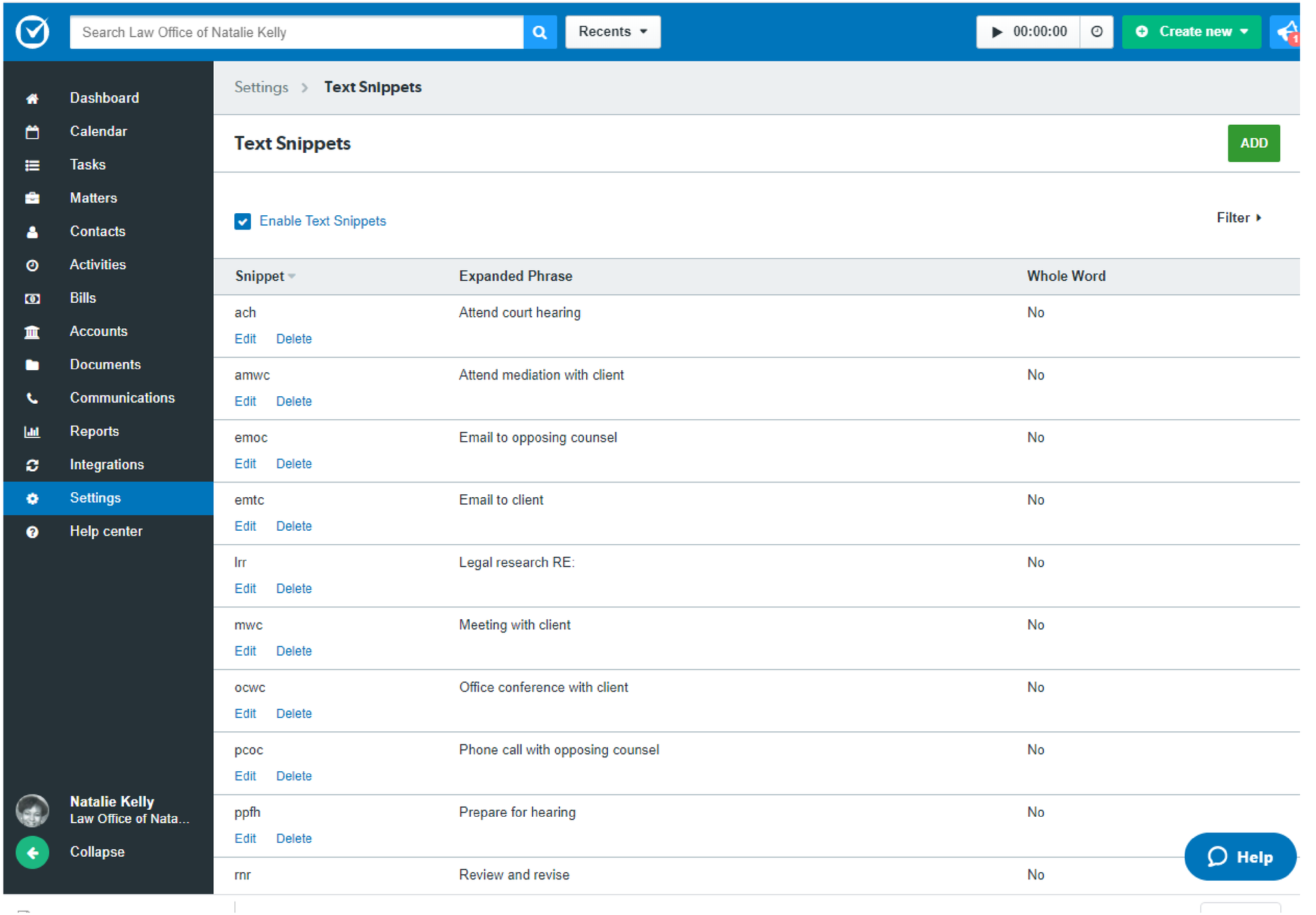
What You Could Do

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

Photo by Christina @ wocintechchat.com on Unsplash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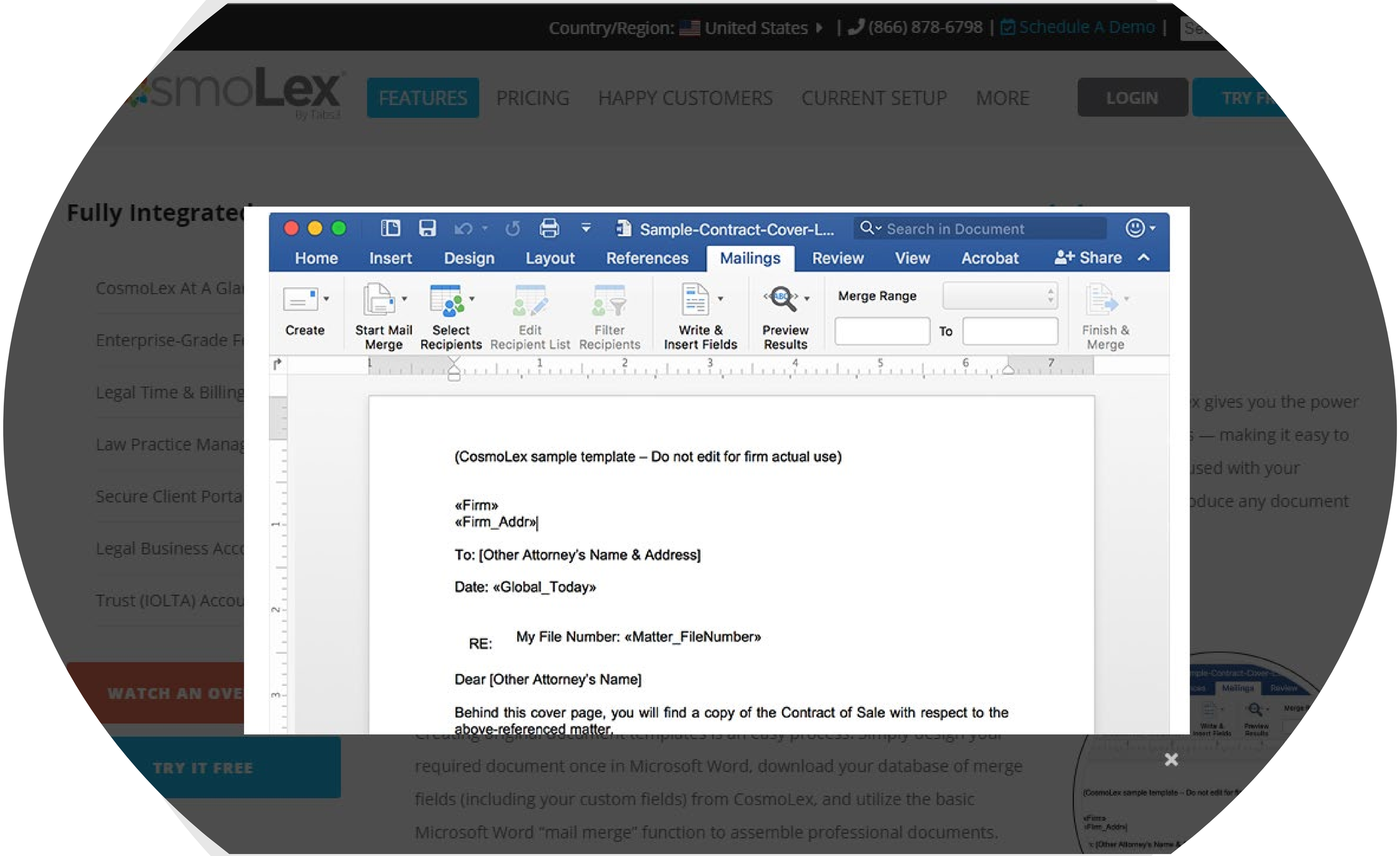
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«Firm»
«Firm_Addr»
To: [Other Attorney's Name & Address]
Date: «Global_Today»
RE: My File Number: «Matter_FileNumber»
Dear [Other Attorney's Name]
Behind this cover page, you will find a copy of the Contract of Sale with respect to the above-referenced matter.
x gives you the power
— making it easy to
sed with your
oduce any document
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.

Use Voice Recognition Tech

- Smartphone dictation
- Desktop dictation
- Virtual Assistance dictation

Photo by Marc Kleen on Unsplash

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TIME BILLING
AND
ACCOUNTING

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!

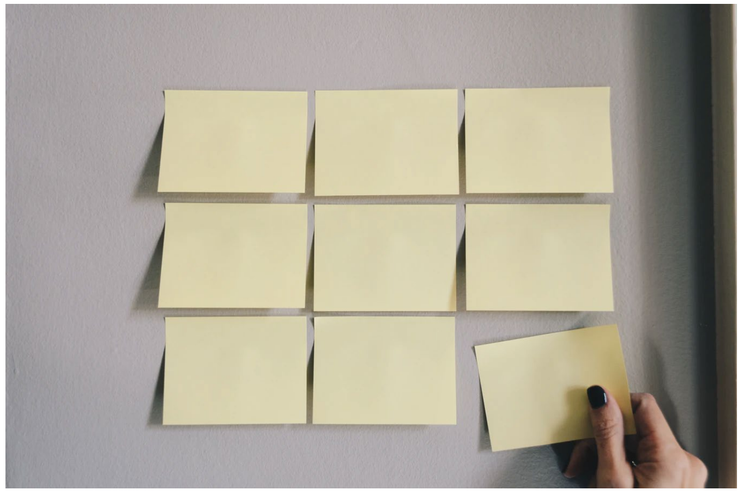


Photo by Kelly Sikkema on Unsplash

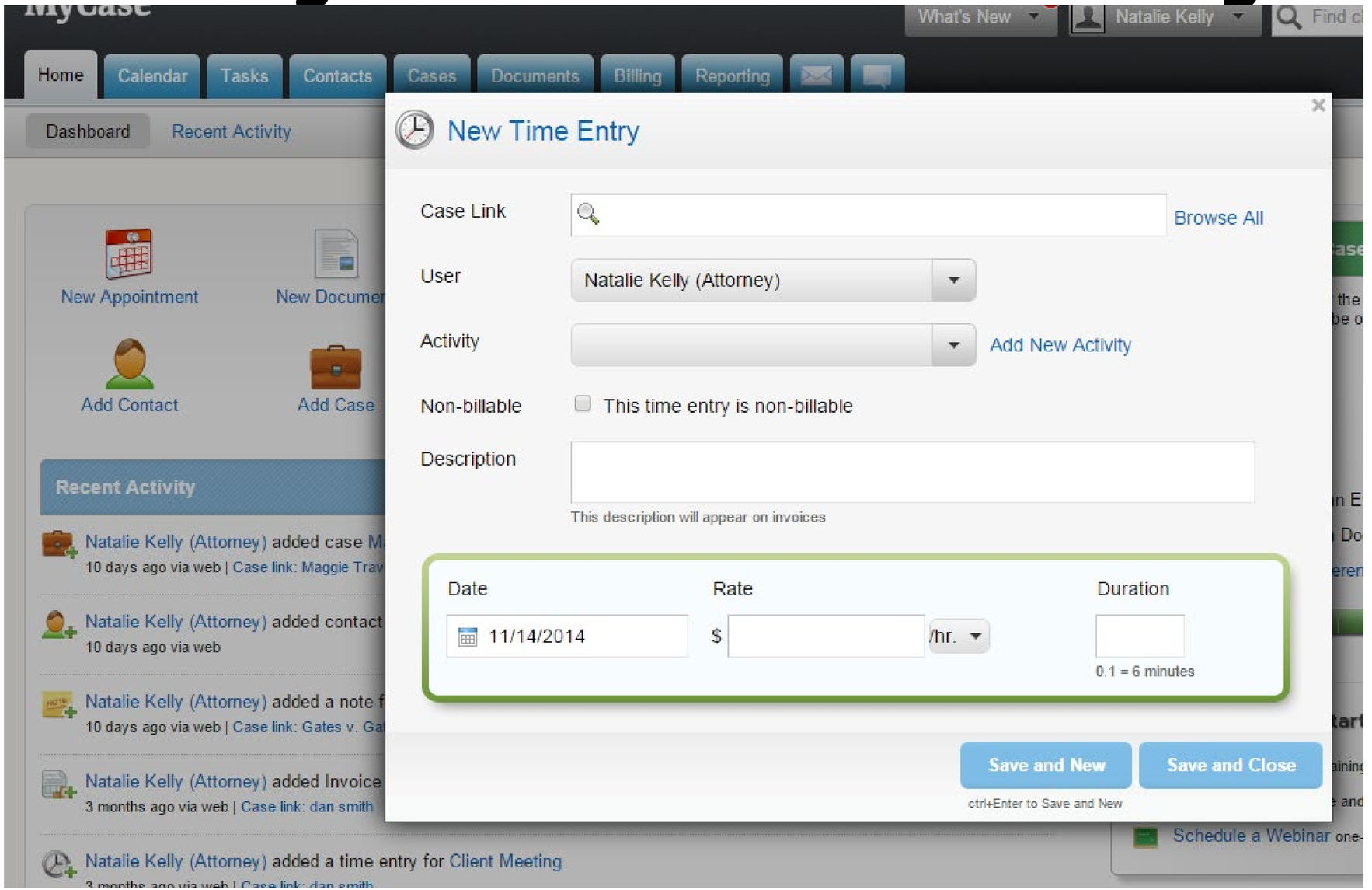
What You Could Do

Automate tracking and invoicing for quicker payment and better reporting!

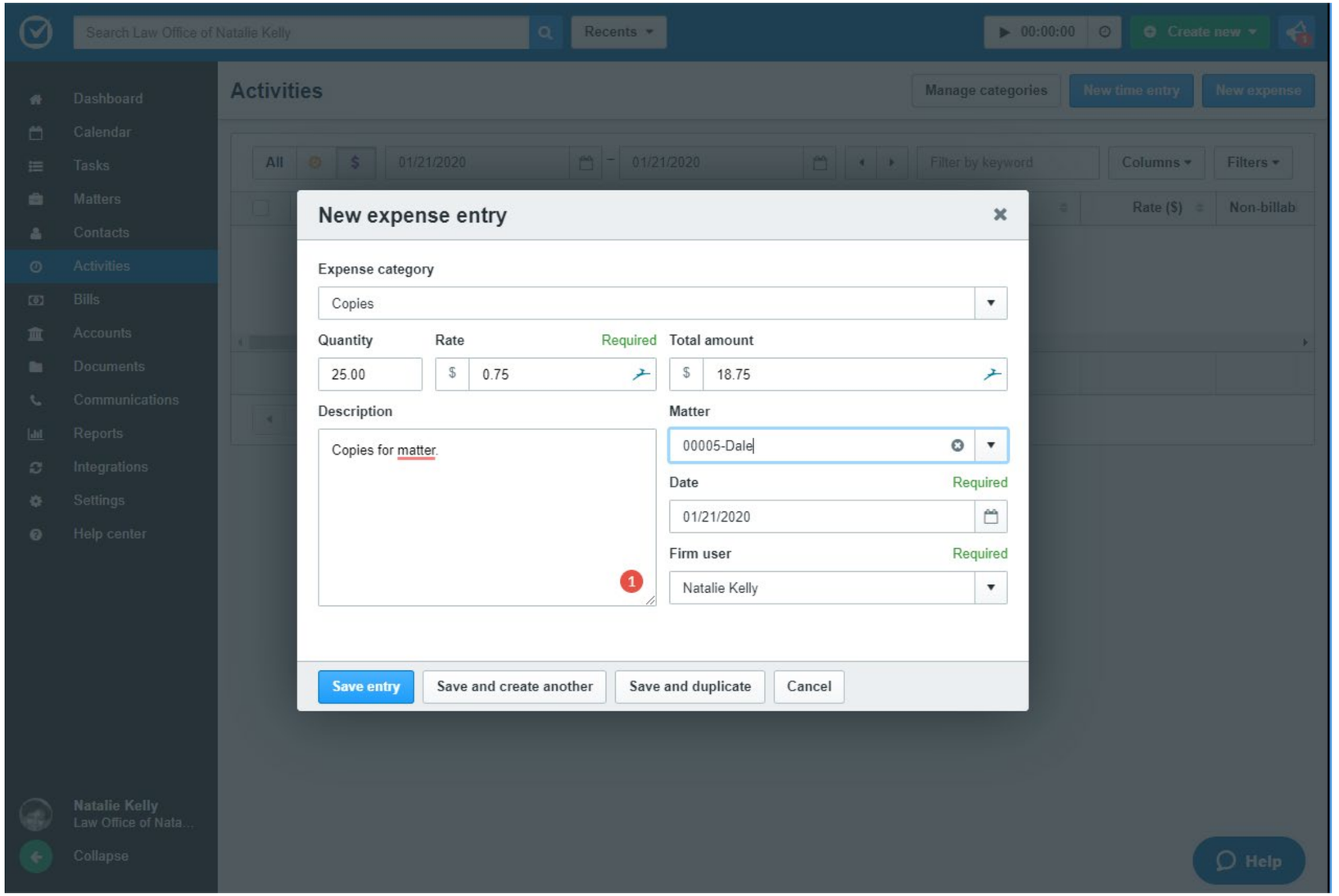
Updated Time Tracking and Billing

- 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



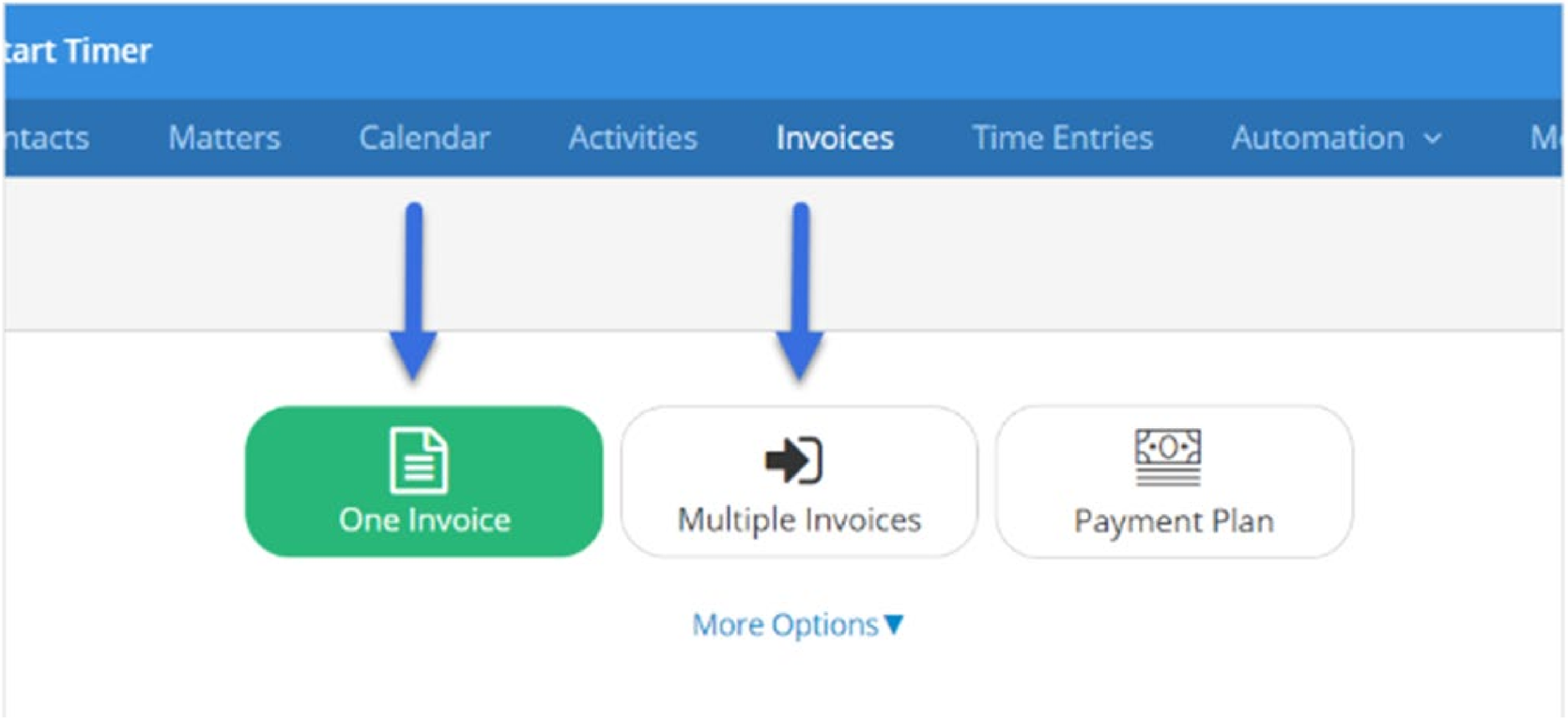
Clio Expense Entry



Directions for Practice Panther Invoices

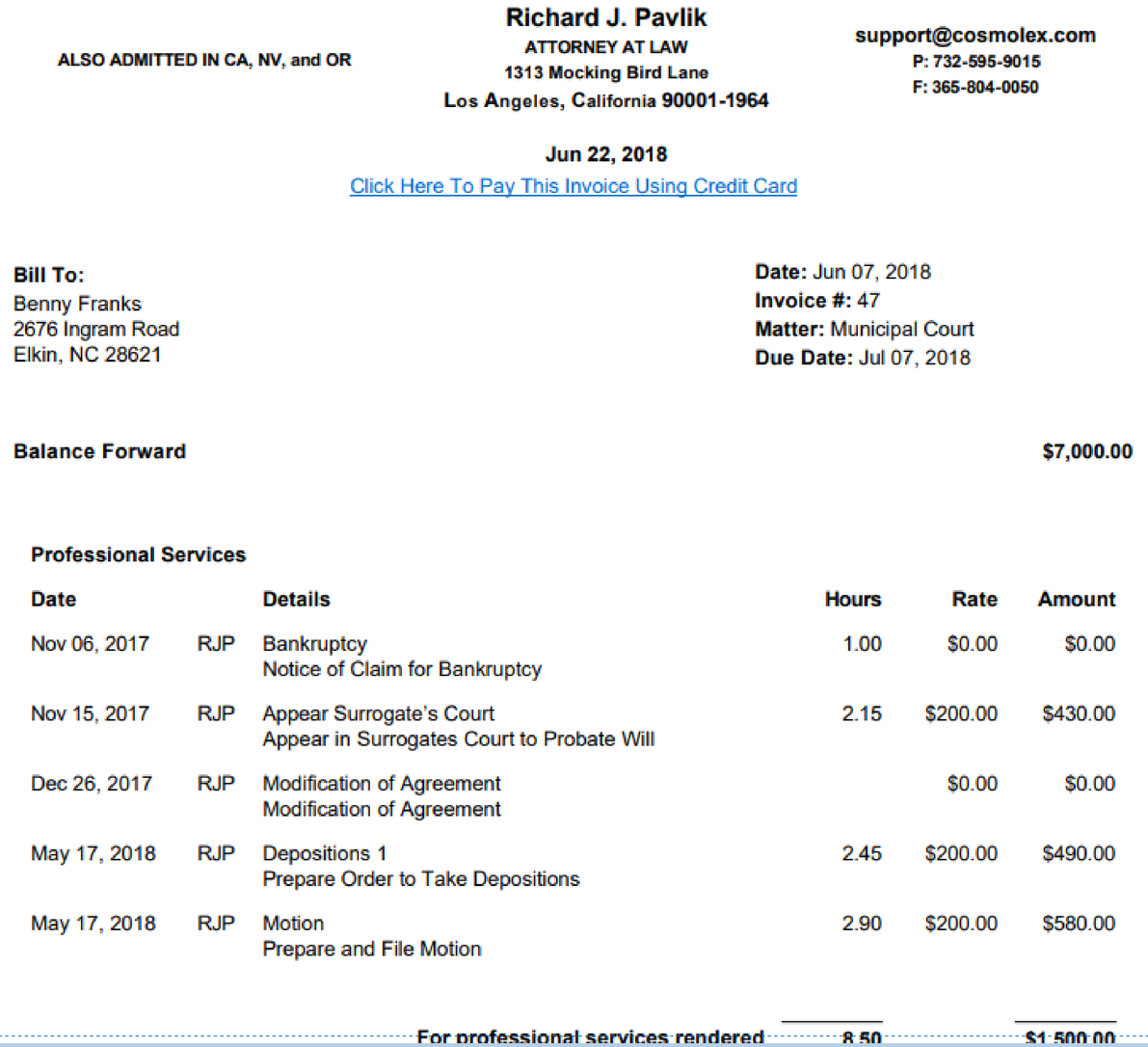
Create an invoice

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

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



ALSO ADMITTED IN CA, NV, and OR

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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**

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PRACTICE MANAGEMENT

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

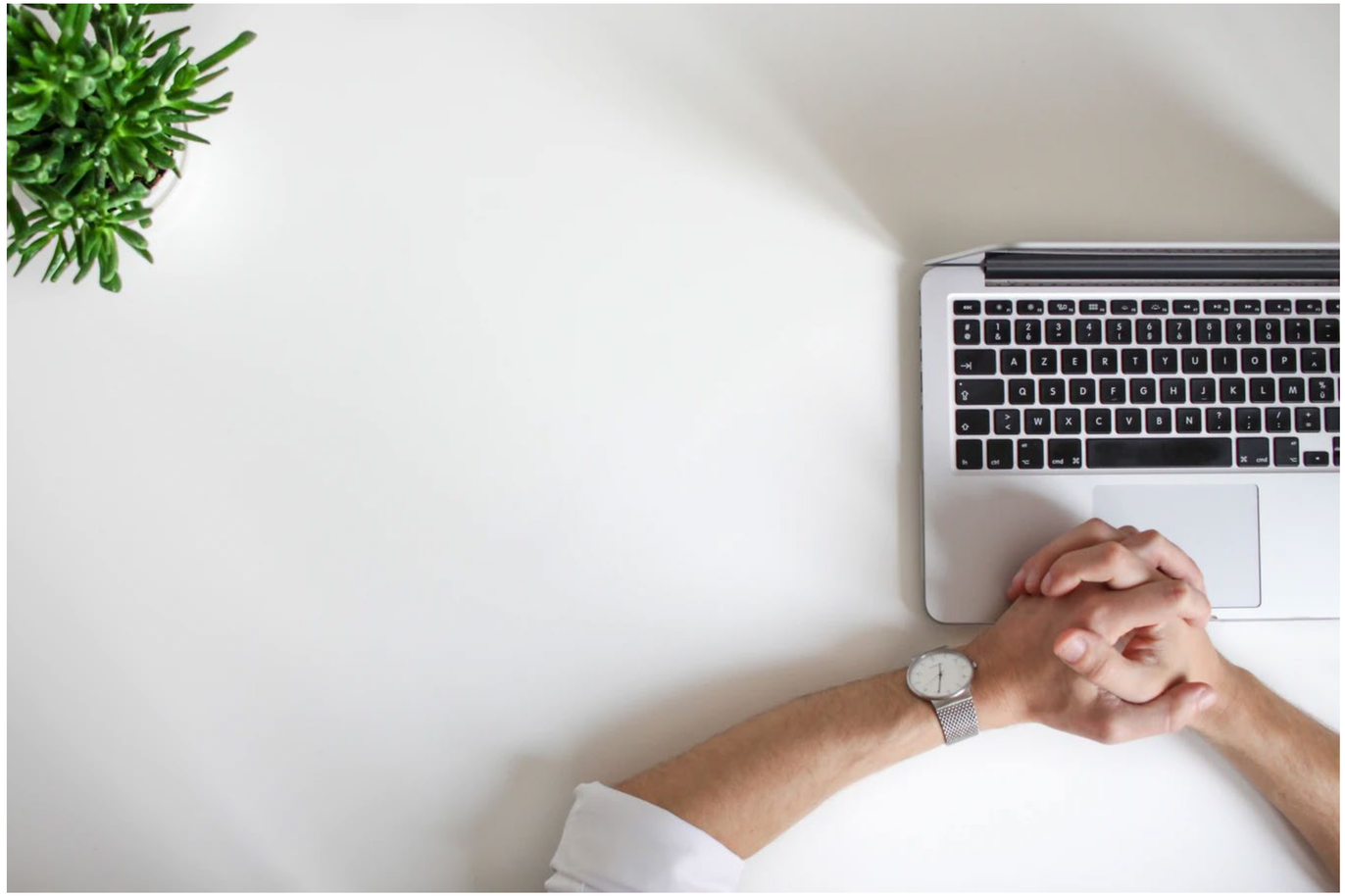
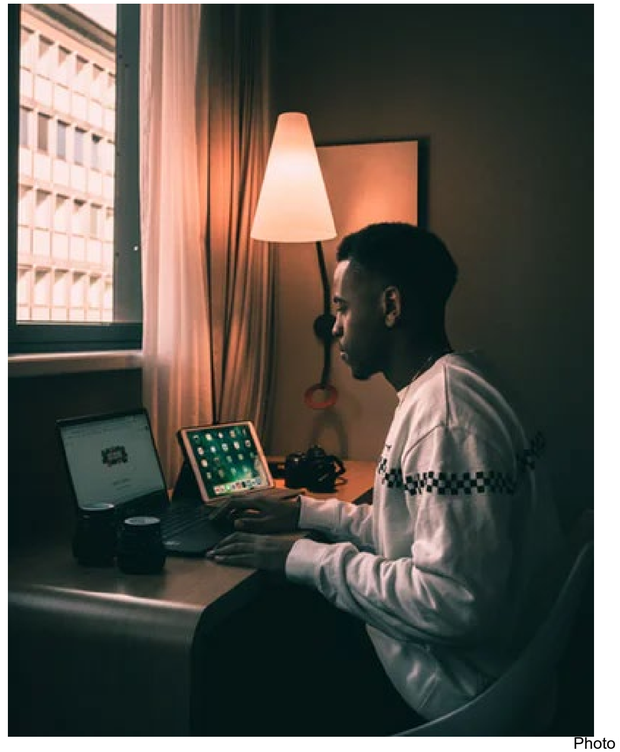


Photo by NordWood Themes on Unsplash

What You Should Do

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



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Q & A

THANK YOU!!!

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Blog: Georgia Practice Advisor
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