

TECHNOLOGY FOR LAYWERS 2004

OP1: Opening Plenary Session 60 Tips in 90 Minutes

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The Law Society of
Upper Canada | Barreau
du Haut-Canada



OBA • ABO
Ontario Bar Association
Association du Barreau de l'Ontario

Canadian Society for the Advancement
of Legal Technology

L'association canadienne pour l'avancement
de l'informatique juridique





60 Tips In 90 Minutes

- ✦ David J. Bilinsky
- ✦ Richard Ferguson
- ✦ Michael Girard
- ✦ Reid Trautz

Today's Tips Agenda

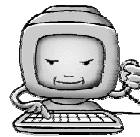
- ✦ Working faster
- ✦ Working better
- ✦ Marketing
- ✦ Making more money
- ✦ Gadgets
- ✦ Safe computing
- ✦ Learning more



Working Faster



Keyboard Shortcuts



- ✦ Ctrl-O in IE opens an address window
- ✦ Ctrl-Shift-C opens a new contact in Outlook
- ✦ Ctrl-Z cancels your last edit or change in any MS Office application
 - Go back several steps

Adobe Acrobat

- ✦ .PDF file universally accessible
- ✦ Reader vs. Standard vs. Professional
- ✦ Secure the version of the document you _prepared
 - Encrypt and password protect
- ✦ Removes metadata associated with original file
- ✦ Recipients can email comments back to you
- ✦ PDF Converter
 - www.scansoft.com



Add-ins for Outlook

- ✦ Holidays
- ✦ Events



Get your Faxes by email

- ✦ Handle your fax traffic electronically
- ✦ Local fax number(s)
- ✦ Capture all incoming faxes in a TIF file
- ✦ Automatically emailed to you
- ✦ View faxes wherever you have email access
- ✦ Stepping stone to electronic file
- ✦ www.efax.com
- ✦ www.jconnect.com
- ✦ www.telus.ca



Automate Your Corporate Work

- ✦ Corporate records and corporate document generation product for Ontario and Federal companies
- ✦ Fast Company
 - www.doprocess.com
- ✦ Various packages
 - www.dyeanddurham.com



Paste Special is, Well, Special!



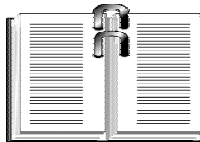
- ✦ Available in almost all Windows applications
- ✦ Select Edit, then Paste Special, then Unformatted

Use Your Start Menu



Use Your Repeating Appointment Feature

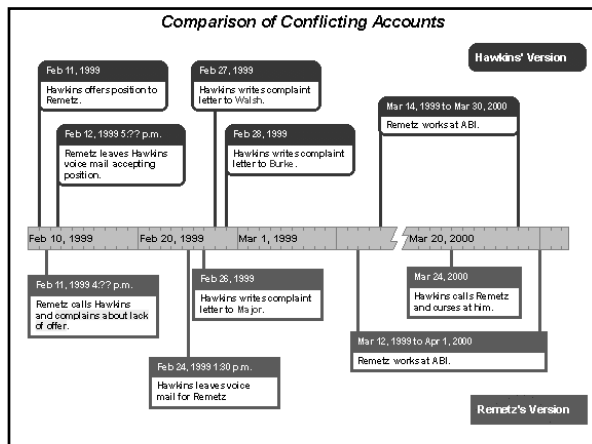
- ✦ All of us have regular repeating tasks
- ✦ Schedule regular monthly appointments with yourself
- ✦ Attend to those tasks that **MUST** be done each month
 - prepare accounts
 - review trust records
 - take client to lunch



Use Timeline Software

- ✦ Use graphical timelines
- ✦ Great help to visually demonstrate a sequence of events
- ✦ Helpful from an analytical prospective
- ✦ Can be very persuasive
- ✦ TimeMap
 - www.casemap.com





Working Better



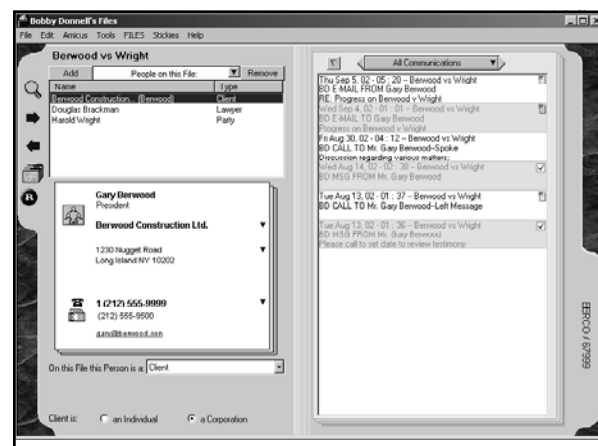
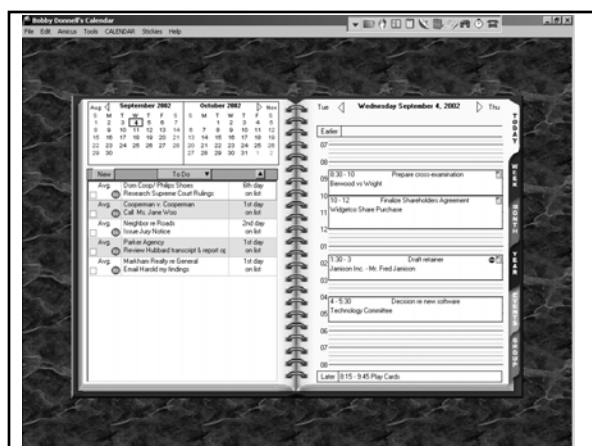
Only Want to Get One Office System?

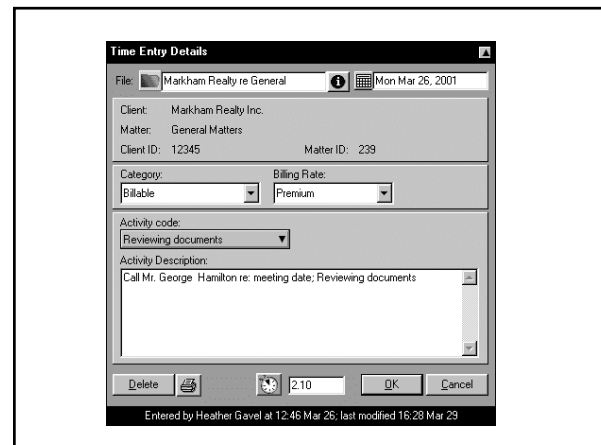
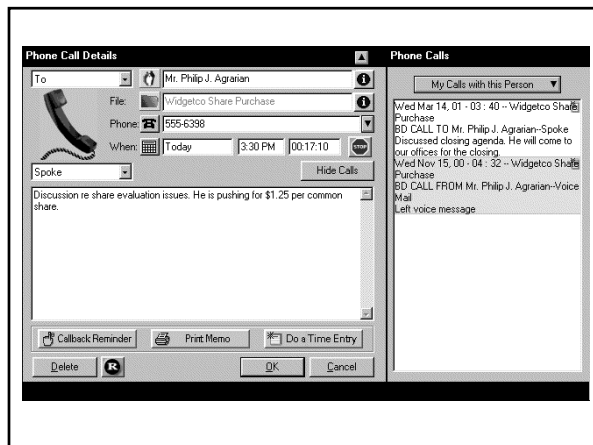
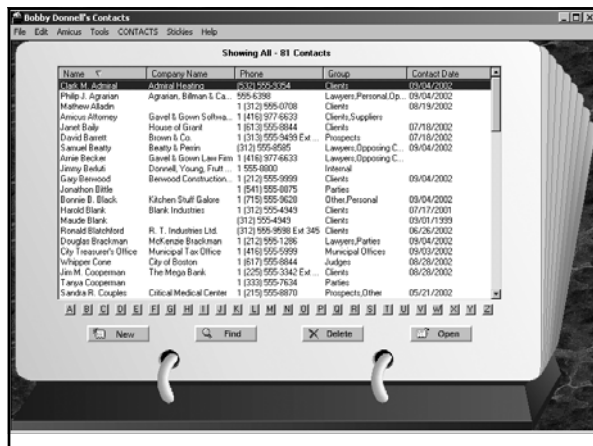
- ◆ Get PCLaw version 7
- ◆ Combines legal and general accounting with practice management features
- ◆ Work from one integrated desktop
- ◆ www.pclaw.com



Practice (Case) Management Software

- ◆ Puts your practice at your fingertips
 - Central nervous system of your office
- ◆ Matter centric
 - Contacts, calendar, to-do's, telephone calls and messages, e-mails, research, reminders, conflict checks, time recording etc...
- ◆ TimeMatters, Amicus Attorney, Practice Master, ProLaw, and others





Stop the Interruptions



- ♦ Give yourself an uninterrupted work space, free of emails, phone calls and other interruptions
- ♦ Urgent tasks vs. important tasks – They are not the same thing

Keep Your Inbox Clean

- ♦ Create sub-folders
- ♦ Use rules to help sort your incoming deluge
- ♦ Clean at the end of each day
- ♦ Adjusting the spam filtering
- ♦ Personal or enterprise spam filtering software
- ♦ Norton Antispam or Brightmail (www.symantec.com) or I Hate Spam (www.sunbolt-software.com)



Work Fills the Time Allotted to It



- ♦ So take control of your time your tasks and your day
- ♦ Selecting the 3 most important things that you MUST do today
- ♦ Decide how much time you SHOULD allocate to each
- ♦ schedule an appointment in your day for each of these three tasks

Marketing



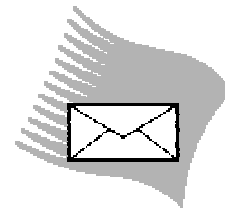
Work Your Contacts List

- ♦ Valuable resource is overlooked
- ♦ Go through your list periodically
- ♦ Keep in touch with clients and potential clients
- ♦ Note the date and on future date contact them again



SendOutCards.com

- ♦ Where New Technology meets Old Practicality



Get a Web Presence

- ♦ Internet is primary source for information gathering for most consumers of legal services
- ♦ Existing and potential clients will Google you
- ♦ Will they find a professional and up-to-date site?



Making More Money



Create a Practice Business Plan!

- ♦ Organized explanation of how you intend to start your practice
- ♦ How you intend to keep it afloat and moving forward
- ♦ Services you intend to provide
- ♦ Budget detailing anticipated revenues and expenses
- ♦ Your marketing plan
- ♦ www.practicepro.ca/financesbooklet precedents



Track your Time on the Road



- ♦ Many billing programs have software add-ons for your PDA

Track Your Time

- ♦ Many lawyers do not track their time
- ♦ The three most common reasons:
 - “We only handle matters on a contingency basis, so the hours we put in don’t really matter.”
 - “Tracking billable hours just takes away from the time that I can be doing legal work for clients.”
 - “All that really counts around here is the amount of money that you bring in every month, not the number of hours you work.”



Track Your Time (cont’d)

- ♦ What these lawyers are really saying is:
 - “Keeping up with my hours is a bother, and I can’t be bothered!”
- ♦ Financial performance really comes down to two measures:
 - Effective hourly rate (EHR)
 - Total Billings



Determine Your Effective Hourly Rate

- ♦ Taking your fees billed and divide it by the total hours put into a client’s file
- ♦ A quality indicator
- ♦ Measure the EHR for all your files
- ♦ Rank the results from largest to smallest



Implement a Financial Reporting System



- ♦ After you develop your business plan
- ♦ Implement a system that can deliver detailed financial information
- ♦ Are you meeting your business targets for current month and YTD?
 - Compare actual income and expense numbers against budget
 - Actual and budget WIP for every lawyer

Implement a Financial Reporting System (cont'd)

- Actual and budget billings
- Actual and budget collections
- Actual and budget write-offs and write-downs
- Aged accounts receivable by lawyer, by client and by area of practice.
- Unbilled disbursements by file compared to previous month to show whether they are increasing or decreasing

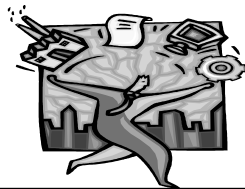


Implement a Financial Reporting System (cont'd)

- funds in trust by client and whether these funds are retainers or funds held on behalf of clients
- List of upcoming trials and motions that compares the expense and retainer funds in trust for each client against expected costs and fees for the courtroom work



Really Useful Gadgets



Why not a Laptop as Your Desktop?

- ♦ Larger screens
- ♦ Greater computing power
- ♦ Larger hard drives
- ♦ Docking stations



PDAs: Palm and Pocket PC



Products
For the
Mobile
Lifestyle

Talk to Your Computer

- ♦ Voice recognition is no longer science fiction
- ♦ Dragon's Naturally Speaking
- ♦ Get a good digital headset and switchbox
- ♦ Can use the same headset for both telephone calls

Accuracy and ease-of-use make it #1
Dragon's NaturallySpeaking 7

Digital Dictation



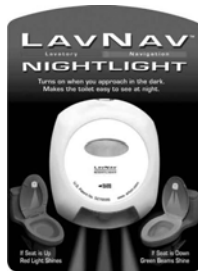
- ♦ Gives you much more freedom in editing and annotating your dictation
- ♦ Frees you from the limitations of physical media
- ♦ Information to be transcribed can be sent by email over the internet

Ergonomics

- ♦ Use wireless keyboard & mouse
 - Avoid RSI
- ♦ Use headset
 - Avoid sore back and neck
- ♦ www.microsoft.com/products
- ♦ www.logitech.com
- ♦ www.labtec.com



Res Ipsa Loquitur



Get your Data onto DVD



- ♦ Back Ups are Essential!!
- ♦ DVD data offers the ability to store LARGE amounts of data onto one disk
 - 4.7 gigabytes on common DVD formats
 - 8.5 gigabytes on DVD+R DL
- ♦ Once a week and take your data off-site

A hard drive in a pen?



Connect your Cell Phone and PC

- ♦ Transfer contacts and other information



Scanning and More

- ✦ Sheetfed scanners allow you to capture digital images of documents
- ✦ Very cost effective to turn paper files into digital files (PDF)
- ✦ Once digitized they can be indexed, searched, shared, copied, and OCR'ed (Optical Character Recognition)
- ✦ Omnipage and Textbridge
 - www.scansoft.com



Turn Your Computer Into A Telephone



- ✦ Free software tool
- ✦ Use your computer like a telephone to communicate with other Skype members
- ✦ No long distance charges
- ✦ All you need is a headset plugged into your computer and a high speed internet connection
- ✦ www.Skype.com

Consider VoIP: Voice Over Internet Protocol

- ✦ Delivery of telephone services over the internet
 - Voice terminal links into high speed internet connection
 - Regular telephone hooks into this terminal
- ✦ Works like a normal telephone
 - Virtually all the options telephones typically have such as call display, voice mail etc.
- ✦ Telephone number is not tied to physical location
- ✦ People dialing your usual number will reach you wherever you are



Use Technology at Trial

- ✦ Moving from static to increasingly animated:
 1. Boards that can be mounted on easels
 2. Timelines in graphical form
 - TimeMap by CaseSoft: www.casemap.com
 3. DryTac mounted illustration
 - www.drytac.com



Use Technology at Trial (cont'd)

4. PowerPoint slide presentation
 - www.office.microsoft.com
5. An automated document imaging and presentation system
 - Trial Director: www.trialdirector.com
 - Sanction: www.verdictsystems.com
6. Computer animation or simulation of an event



Digital Pictures and Camcorders

- ✦ Both now relatively inexpensive
- ✦ Incorporate pictures or movies into negotiation or mediation briefs
- ✦ Create more impact, personalize your client and make your work product look more professional
- ✦ A “day in the life” video
- ✦ Video of a witness as opposed to a dry written statement
- ✦ Movie of the accident scene



Practice Safe Lex!



Create an Email Policy to Send to all Clients

- ♦ Avoid misunderstandings
- ♦ Set expectations
- ♦ Stay safe
- ♦ See Carole Curtis precedents at www.practicepro.ca/difficultclients (family law)



Develop and Implement An Internet Use Policy

- ♦ Privacy risks to confidential firm info:
 - Personal emails, Web sites, instant messaging
- ♦ Bandwidth hogs
- ♦ Exposure to viruses, worms, spyware and other “malware”
- ♦ www.lawsociety.bc.ca/services/practice/body_practice_policy-internet.html



Virus Protection

- ♦ Internet can be a dangerous place for an unprotected computer
- ♦ Good anti-virus program (Norton Anti-Virus and McAfee are most popular)
- ♦ Update the software regularly
 - Set to do this automatically
- ♦ AVG – free AV software
 - www.grisoft.com



Avoiding Malware

- ♦ Computer acting *strnagley*???
- ♦ Programs are installing themselves on your computer
- ♦ Adware
 - Ad-aware: www.lavasoftusa.com
- ♦ Spyware
 - Spybot: www.safer-networking.org
- ♦ Use both weekly



You Need a Firewall

- ♦ Minimize the chance of someone hacking into your computer system
- ♦ For an office network
 - Hardware or software solution
- ♦ For home computers
 - Symantec and McAfee
 - Most recent releases of XP
 - Free option is ZoneAlarm
 - ♦ www.zonelabs.com



Check Your System Security and Probe Your Ports

- ♦ Free internet vulnerability test
- ♦ www.GRC.com
- ♦ Probes your ports
- ♦ Identifies internet vulnerabilities
- ♦ Determines if your firewall is working properly

Shields UP!!

The Metadata Threat: Can Your Documents Snitch on You?

- ♦ Metadata = data about data
 - Automatically created in computer file
 - Can include: deleted text, tracked changes, file owner, creation and access dates
- ♦ Turn of "Fast saves" in Microsoft products
- ♦ To eliminate metadata:
 - Payne Consulting's MetaData Assistant - www.payneconsulting.com
 - Send files as PDFs
 - Send as RTF
- ♦ Free Tool from Microsoft – only for Word 2003
- ♦ See www.practicepro.ca/metadata



Encrypt Your Laptop!

- ♦ Encrypts hard drive and prevents Windows from loading without an appropriate password
- ♦ Your system will take a performance hit of up to 5-6%
- ♦ Use NTFS on Windows XP
- ♦ PCGuardian: www.pcgardian.com
- ♦ R-Guard: www.data-securitysoftware.com
- ♦ Cryptainer: www.cypherix.com/prods.htm
- ♦ CoreGuard by Vormetric, Inc.: www.vormetric.com



Backup, backup, backup!

- ♦ Restore, restore, restore!
- ♦ Rejoice, rejoice, rejoice!



SECOND COPY 2000

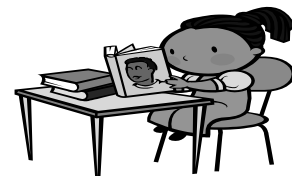


Laptop Screen Saver

- ♦ If laptop case is compressed keys will begin to leave their impression on screen
- ♦ As friction takes its toll - the display will completely malfunction
- ♦ Place VERY thin sheet <1/16" foam padding between keyboard and LCD display before closing the laptop
- ♦ Helps prevent abrasion by the keys against the display



How to Learn Even More



Keep in Training

- ♦ Education and training is an activity and process
- ♦ Not a one-time event
- ♦ Reputable trainer
- ♦ Power Users
- ♦ Conduct lawyer and staff roundtables
- ♦ Share tips and tricks



Free On-Line Training from Microsoft

- ♦ Modules for all MS Office components



Keep In Touch With What's Hot

- ♦ Law Office Computing or Law Practice Magazine
- ♦ PC World: www.pcworld.com
- ♦ PC Magazine: www.pcmag.com
- ♦ Mobile Computing: www.mobilecomputing.com
- ♦ Leave them in reception for your clients



Keep In Touch With What's Hot On the Web

- ♦ Canadian Bar Association's PracticeLink: www.cba.org/practicelink
- ♦ Law Practice Today: www.lawpracticetoday.org

Law Practice TODAY

Ga Ga for Google

- ♦ Do more than search
- ♦ Excellent Tools
 - Toolbar
 - Deskbar
 - Labs
 - Calculator
 - Froogle



Can't Live Without Websites #1

- ♦ Mapquest.com
- ♦ Locate addresses or postal codes on a map
- ♦ Provide you with directions from one address to another
- ♦ Linked to your website to give other people a ready drawn map of where your office is located
- ♦ See also www.ca.map24.com



Research Tips and Strategies

- ♦ Read software reviews in law-specific publications and web sites

ABA LAW PRACTICE MANAGEMENT SECTION
MARKETING • MANAGEMENT • TECHNOLOGY • FINANCE

Law PracticeToday

Law Computing *online*

LawTechnologyNews
Products, Systems & Services for Legal Professionals

Can't Live Without Websites #2

- ♦ Canada 411: www.canada411.com
- ♦ Enter partial information about a person
- ♦ Great for gathering information and getting addresses

Canada **411**™

The Real Scoop on Search Engines

- ♦ www.SearchEngineColossus.com



Go to practicePRO!!

- ♦ Many resources and papers to support lawyer
- ♦ www.practicepro.ca
 - risk management & claims prevention
 - wellness & balance
 - technology



Do Factual Research

- ♦ not just legal research



Try Blogging

- ♦ Weblogging or Blogging or (Blawging if it is legal site) is very popular
- ♦ Another means of establishing a web presence
- ♦ Post comments and snippets of info to a website through easy to use interface
- ♦ Take a look at some of the more popular blogs
- ♦ Blogger.com
 - Free software and hosting service



Get an Aggregator

- ♦ Web sites now “syndicate” their information
- ♦ Government of Canada, many newspapers and weblogs
- ♦ Rather than having to visit 20 new websites and trying to figure out what’s new go to www.Bloglines.com
- ♦ Aggregator accumulates new information in one place



Call in the Tech Experts



- ♦ Technology has become very technical
- ♦ Don't waste your valuable billable time trying to fix things
- ♦ Attend to your client deadlines and priorities instead

Work Hard and Play Hard!

- ♦ And remember to have some fun

CrazyFads.com



Our Thanks!!

For coming

For listening

For keeping up



David Mike Reid Rick.