

Tech Bootcamp for the Practicing Attorney: Everything You Need to Know

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Mark and Mitch

- Mitch "I'm a PC" Mark. "I'm a MAC"



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So...Lower Your Expectations


Mark

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Continuous Improvement

1% Improvement

Aggregate Marginal Gains



Mark

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"the 1% theory of continuous improvement"

2002:

Sir Dave Brailsford takes over British Cycling Team
76 years / 1 Gold Medal

2008:

7/10 Gold Medals

2007 to 2017:

British cyclists won **178 world championships and 66 Olympic or Paralympic gold medals** and captured **5 Tour de France victories**

Mark

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Sir Dave Brailsford and the British Cycling in 2002

Improve everything you do incrementally by 1%
They will collectively add up to massive improvement
"aggregation of marginal gains"



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“Technology Bootcamp”?

*Goal: To learn new ways to leverage technology
Immediate tips that will give you back 30 or more minutes of your working day,
every day, and will make you a more competent attorney*

Mitch

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What is this bootcamp

This is NOT a recommendation for any one program.

- We both continue to evaluate alternatives and consider switching some of the programs listed here.
- The tools listed are only to explain what is possible so that you can evaluate the best platform for your practice.
- Everything you need to know.
- See what we can do – can your tools do this too?

Mitch

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Tech Stack Starts with Practice Management

- **Customer and Contact database** – a central, firm-wide contact and client database to support marketing and conflict checks
- **Internal and client communication platform** – notes; portals
- **Matter management** – details unique to each matter available to entire team
- **Calendaring** and Task Management – rules-based calendaring, and deadline management and case Tasks
- **Time Tracking** – Recording of billable (and non-billable) hours and link to automatic time entries
- **Accounting and Billing** – Invoicing clients for time and expenses and trust reporting
- **Document storing and sharing** – keeping documents “internal” so single system
- **Document Assembly** – The automated creation and population of specific court forms and fillings

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Key Features of a Practice Management System

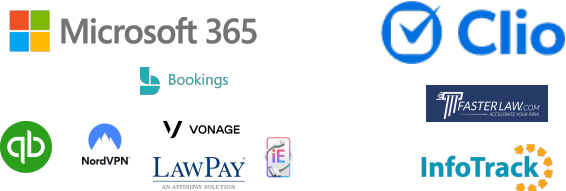
- **Uniform repository** of firm information enables future buy/sell and collaboration
- **Off the shelf** system enables others to assist through co-counsel collaboration tools
- **Collaboration** with clients; opposing counsel; outside counsel
- **Supports** firm scale and reduces on-boarding time of new staff and attorneys
- **Established process** improvements and firm efficiency

Mitch

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Mitch's Tech Stack

The tools I use right now



Mitch

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Mark's Tech Stack

The tools I use right now



Mark

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Mashups = workflows



Mark

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Calendaring / Scheduling: Calendly w/ Mark: *MASHUP / WORKFLOW*

- Calendly
- Polls
- Zoom
- TextExpander

Mark

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Use Case: mark i unger

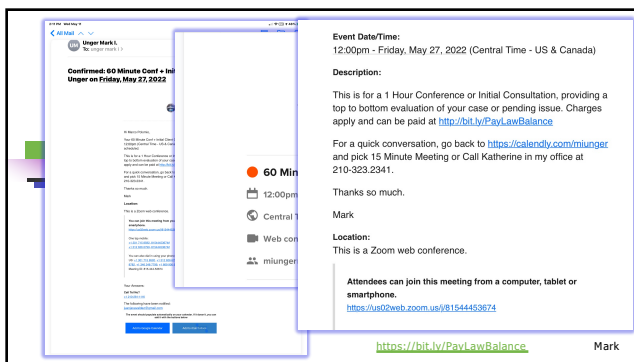
Calendly [link]

Mark

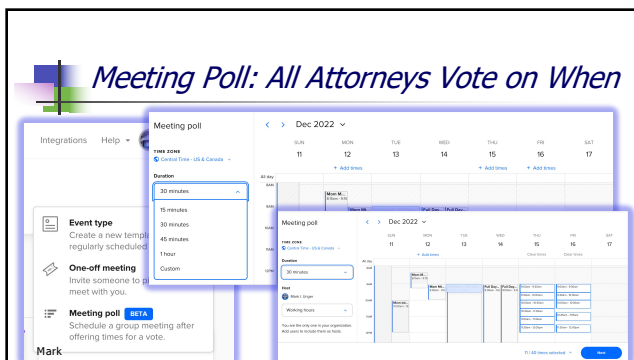
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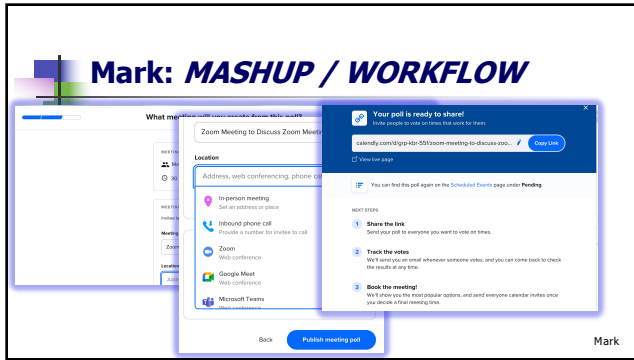
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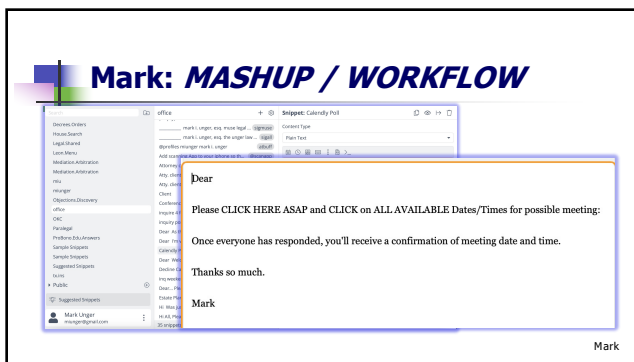
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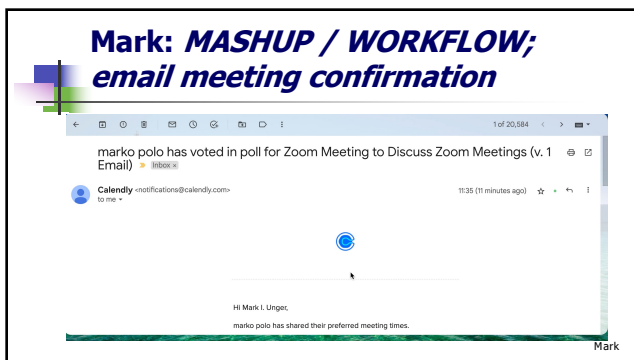
18



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Bookings

365 for Business-Bookings

- Clients **schedule** time when you are available
- **Empowers** communication
- Sends you and client **email and text reminders**
- Sets up **teams** meeting automatically
- **Included** in MS365 Business subscription



Mitch
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Text Automation and "Managed Automation"(miu)

- **Mitch:**
- **1. MS Quick Parts**
- **2. Scripts (formatting)**
- **3. Styles (formatting)**

- **Mark**
- 1. Text Expander**
- 2. iOS Snippets**
- 3. Snippets in Cloud Practice Management System (Clio)**

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What is AutoText

- Standardized Text that is repeated in communications and documents
- Reduces errors, time to communicate, and creates uniform information for the client
- Examples:
 - Microsoft – Quick Parts
 - Universal - TextExpander

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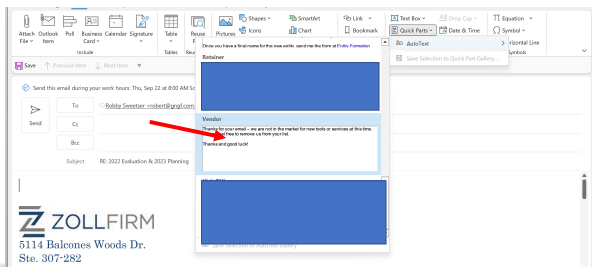
QuickParts AutoText in Outlook

- Driving instructions to office
- Retainer transmittal language
- “No thank you” emails to vendors
- Referral emails to clients
- Next steps in transactions/litigations/ etc.
- Billing questions responses.

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Outlook QuickParts



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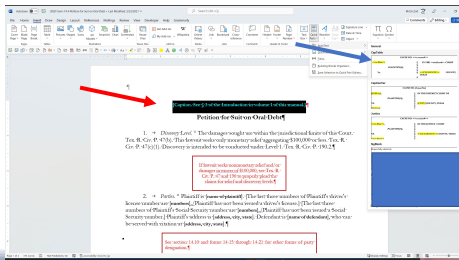
Quickparts AutoText in Word

- Attorney Signature Blocks
- Verifications for affidavits
- New Address Blocks
- Coded fields for Document Automation

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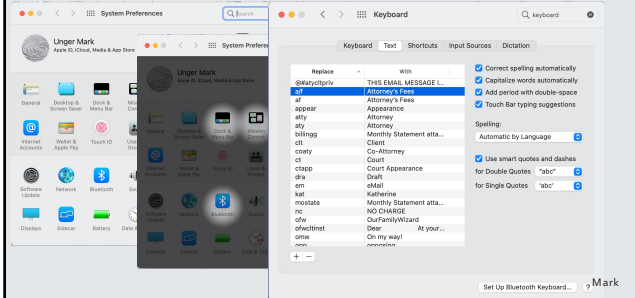
Word Examples



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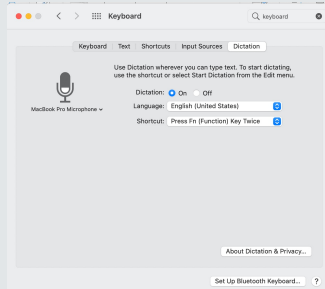
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"Managed Automation" (MIU): MAC Snippets (auto expand keystrokes to words, phrases)



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Bonus PT: Dictation (Baked into iOS/ Mac and iPad via Fcn x 2)




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Bonus PT: Dictation (Some limited functionality within Windows
 but... See Dragon (Dictation) Professional

a. Windows 10 users: Tap "Windows
 + H" on Keyboard or microphone
 on virtual keyboard (stolen from
 Apple of course)

a. *Standalone software: Dragon
 Professional (app. \$500.00)*
 or
 b. *Dragon Anywhere*
(\$15/mo or \$150/yr)



Dragon Professional is the #1 rated Dictation Software
 Techradar praises Dragon Anywhere for its excellent
 accuracy rates and a deep vocabulary. Their Black Friday
 sale includes several offers for Techradar readers:

Free USB with code: USB2022PREEE
 Free Shipping + Headset with code: USB2022PFS
 \$50 off with code: SAVE50DPH

Codes above can be stacked to take advantage of multiple
 offers. [Visit Nuance.com](#) for details.

[View Deal](#)

Mark

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[illegible]

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textexpander

office

AT&T 10:33 AM

Thank you very much for your email.

boom2net

Please read this on how email start.

Client

Any client privilege communication

inquiry

Dear

officestruct

Client instructions

PostChatEM

Attorney client privilege commun.

sigall

sigmuse

tos

Welcome/TDS

AT&T 10:33 AM

Edit Snippet

tos

boom2net

Welcome/TDS

Welcome to The Urgent Law Firm email

After signing, Please enter email in the site in "ADDRESS" in Post a Message in the site in the Welcome message history "ADDRESS" to get full understanding and agree to the below terms regarding privacy discussed with you.

Please sign in and change your password

This will be the primary method, outside of necessary, to access your account and to

This website is CONFIDENTIAL and we do hereby to the client and members of the U.S. Army or other designated authorized

NO documents or data generated or received by this system are to be used for any other purpose than the one for which they were created. It is not to be used for any other purpose than the one for which they were created. It is not to be used for any other purpose than the one for which they were created.

Copy

Save to Dropbox

Cancel

Mark

Snippet/ABBV Expands to FULL TEXT

<https://smilesoftware.com/textexpander>

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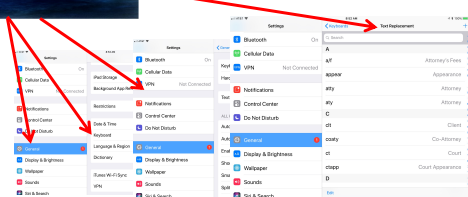
Textexpander Samples - Mitch

- /addr – office address
- /ver - verifications.
- /mark –signature

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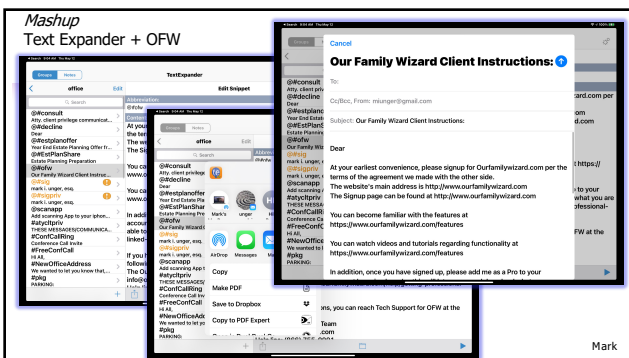
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IOS SNIPPETS



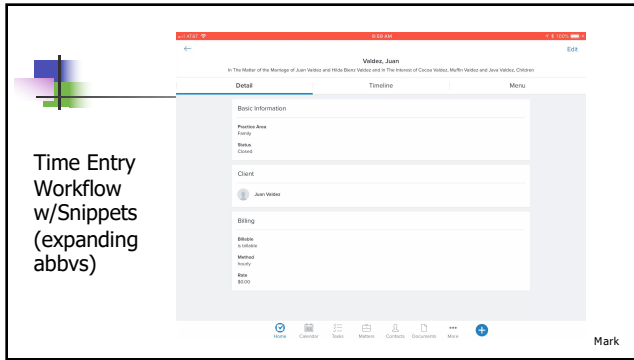
Mark

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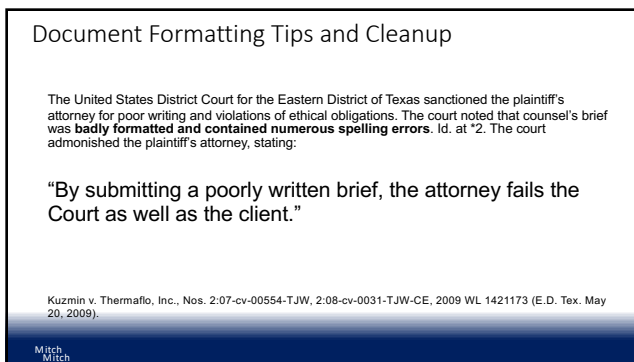
Mark

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Time Entry
Workflow
w/Snippets
(expanding
abbvs)

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Document Formatting Tips and Cleanup

The United States District Court for the Eastern District of Texas sanctioned the plaintiff's attorney for poor writing and violations of ethical obligations. The court noted that counsel's brief was **badly formatted and contained numerous spelling errors**. Id. at *2. The court admonished the plaintiff's attorney, stating:

"By submitting a poorly written brief, the attorney fails the Court as well as the client."

Kuzmin v. Thermaflo, Inc., Nos. 2:07-cv-00554-TJW, 2:08-cv-0031-TJW-CE, 2009 WL 1421173 (E.D. Tex. May 20, 2009).

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Real Time Auto Correct w/ Grammar correction



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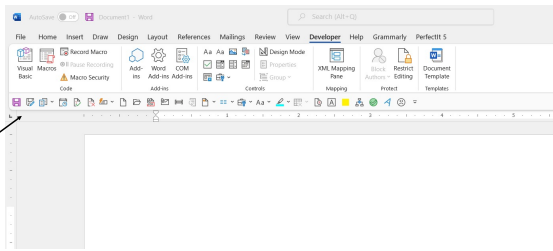
39

Word Toolbar in Action

- Key tools in Word avoid errors are just a button away
- Do not need advanced coding, just someone to set it up and then the attorney to execute it

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Microsoft Word



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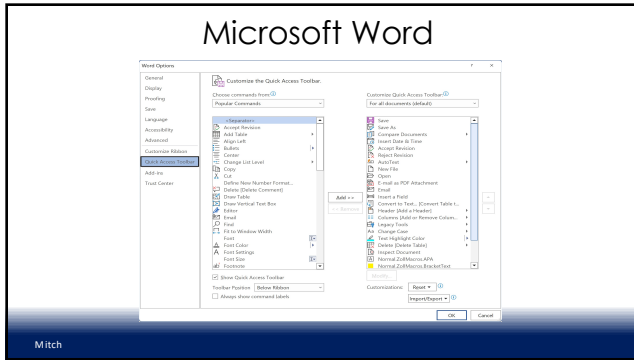
Word Tools For productivity

Quick Action Toolbar – best tips

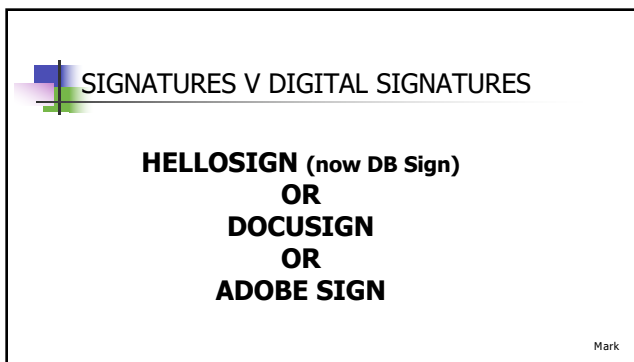
- Insert date
- Highlight bracket text
- **Document inspector – remove hidden data on final run**
- **Send email with pdf**
- Send email with word document
- Convert table to text
- Macros

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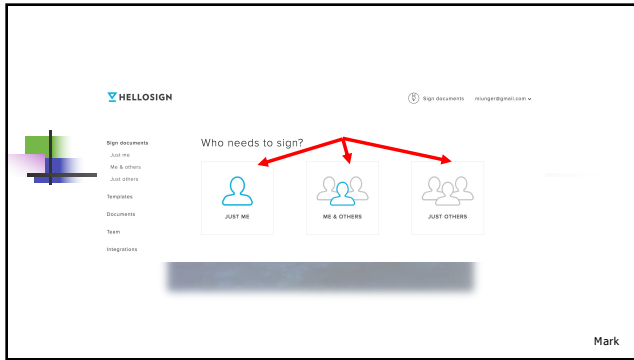
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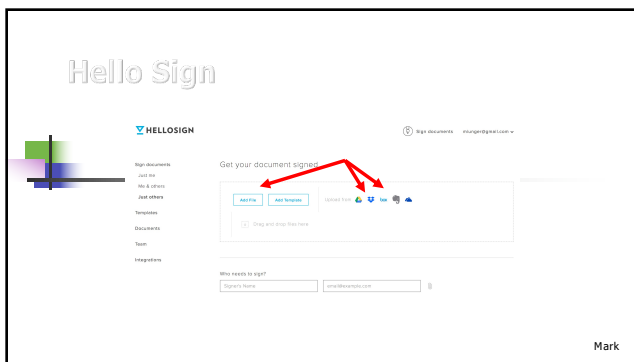
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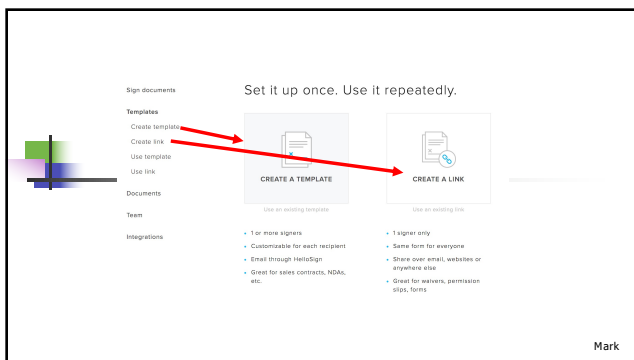
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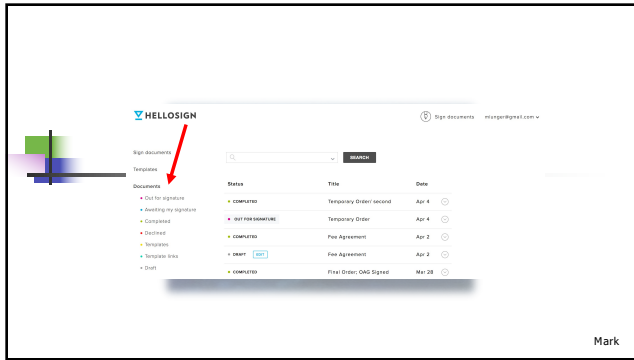
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SIGNATURES V DIGITAL SIGNATURES

(SEE MASHUPS FOR ALL OTHER NEEDS)

Use Case Mashups

1. **Signing Docs (obv)**
2. **MSA's**
3. **R. 11 Agreements**
4. **Final Orders**
5. **CC.Processing Authorizations**

Use Case Mashups

6. **Client Affidavits**
*Unsworn Declarations in Support of TRO etc
7. **Inventories**
8. **Q/A for Client Intake**
9. **Etc.**

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Macros

Repeatable code that can apply to any word document

- Blue book/green book rules
- Document formatting
- Document automation
- Document cleanup (address updates, firm standards)
- Highlight brackets of open text

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Toolbars & Macros in Action

Tools & Macros in Action

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[illegible][illegible]

53

[illegible]

Text Collection Tools

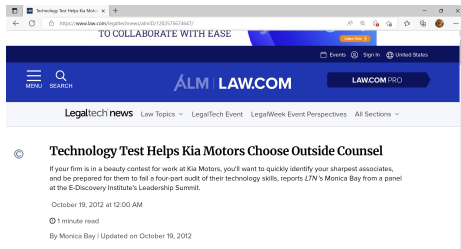
iMazing/iExplore

- Capture Text message from iPhone backup
- Produces single text conversation rather than images of conversations (duplicate discovery!)
- Confirm information sent is attributed to correct party

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Clients are demanding tech skills



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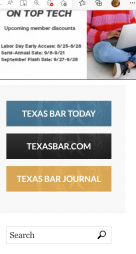
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Texas Supreme Court addresses attorneys' tech competence in amended comment to disciplinary rule

By Lowell Brown on March 1, 2019

A Texas attorney's duty to maintain competence in the practice of law includes knowing about relevant technology, according to a new Texas Supreme Court order.

The court, in *Misc. Docket No. 19-0016*, amended Paragraph 8 of



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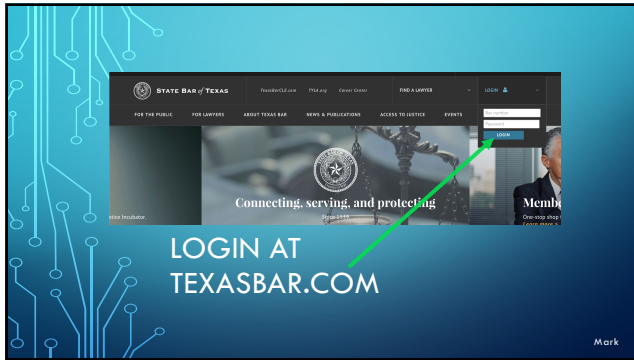
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COMPUTER & TECH SECTION APP (FREE TO SECTION MEMBERS) STATE BAR OF TEXAS 2020 DRIVER'S INSTRUCTIONS

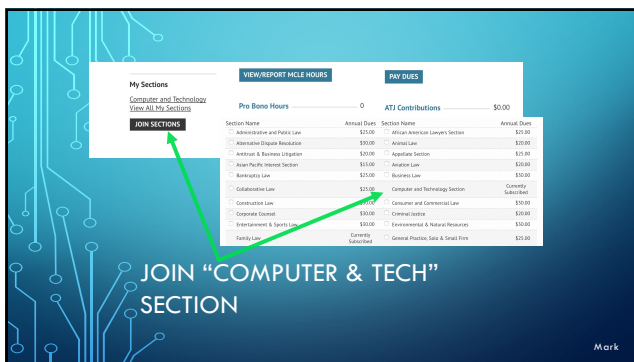
DOWNLOAD OVER 62 SEARCHABLE STATE/FEDERAL CODES
LINK TO OTHER CODE SECTIONS
EMAIL CODE ANYWHERE
PRINT TO ANY WIRELESS PRINTER
RESEARCH LINK TO GOOGLE SCHOLAR FOR CASELAW

Mark

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58



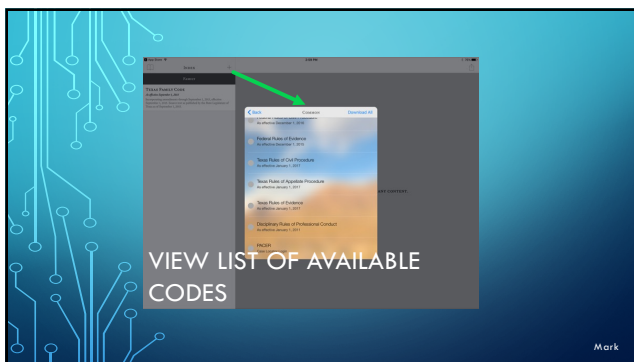
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61

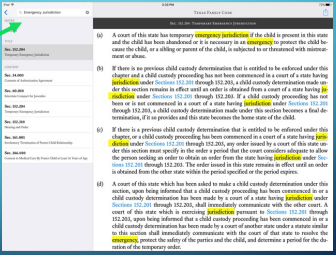


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63

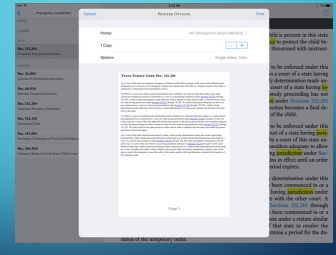
SEARCH FOR KEYWORD
PULLS ALL CITED SECTIONS / LINKS TO OTHER SECTIONS



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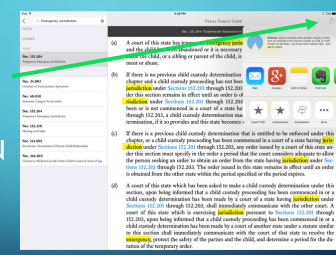
PRINT TO ANY WIRELESS PRINTER FROM TABLET OR PHONE



Mark

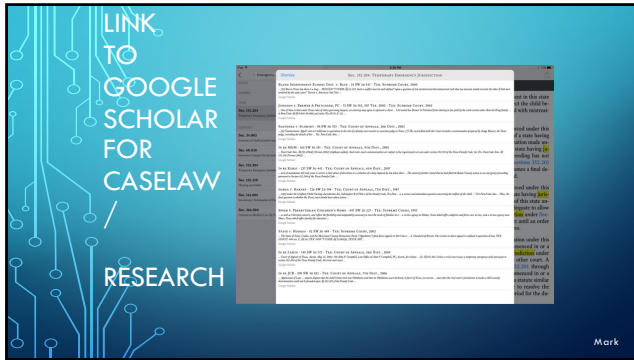
65

UP ARROW PROVIDES ADDITIONAL FUNCTIONS

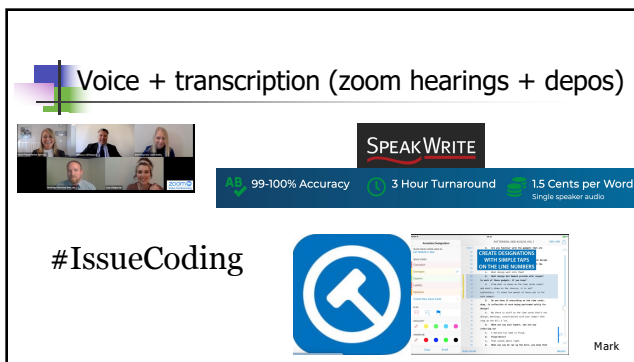


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