

“Technology Bootcamp”?  
Technology and Justice for All CLE  
Computer & Technology Section  
State Bar of Texas

Austin, Texas  
December 1, 2023

Mark I. Unger

San Antonio, Texas

Mitchell F. Zoll

Austin, Texas

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Tech **Re**-Boot(camp) for the Practicing Attorney:

~~Everything~~ **Some**

Things You Need to Know

(Until they change again next week)  
#TheWeekInAI-LawyersBootcamp



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Who are we?



Mitch

Mark

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## What is this bootcamp

### This program is

A baseline review of the systems you need for an efficient firm  
review of tools you already own that can make your firm run better  
quick intro into AI tools that you can use today.

### This is NOT

a recommendation for any one program.  
AI masterclass to "change your world"

Mitch

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AI is everywhere! Like....



Mitch

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But it is really like...



Mitch

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Do you need this incredible new tool?



Mitch

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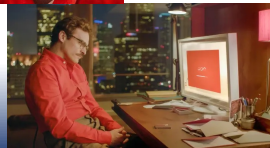
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Mark: "I still  
Love HER!"



Mark

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samantha...er..  
scarlett...er  
samantha



Mark

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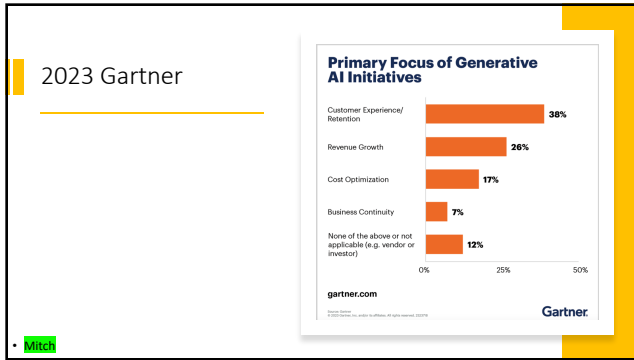
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*So...just the same as last year*

***Lower Your Expectations***

Mark

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*What We're Looking For--*

***Continuous Improvement***

1% Improvement

Aggregate Marginal Gains

Mark

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## The Bootcamp Roadmap

*Tips to implement today for more efficient and effective legal services*

**Standard Tech Stack (Mark v. Mitch)**


- Key Tips and tricks within the software you have
  - AutoTest- Reduce errors and efficiently respond to communications; build document automations
  - Calendar and Task Management-rules-based calendaring, and deadline management and case Tasks
  - Document Formatting and tips - The automated creation and population of specific court forms and filings
- Using AI to create workflows and Summaries
  - ChatGPT
  - Goblin.Tools
- Tie back to tech stack

**Automation**

**Managed automation**

**Artificial Intelligence**

Mark



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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
- Calendar 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 filings

Mitch

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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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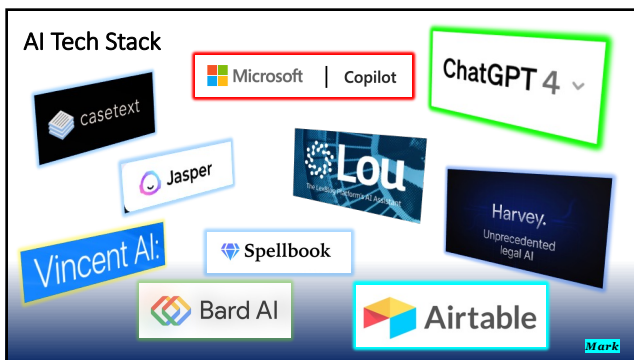
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## The Bootcamp

Tips to implement today for more efficient and effective legal services

- Standard Tech Stack (Mark v. Mitch)
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- Tie back to tech stack

**Automation**  
**Managed automation**  
**Artificial Intelligence**

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- Tie back to tech stack

**+**

**Automation**  
**Managed automation**  
**Artificial intelligence**

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)

Mitch

Mark

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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

Mitch

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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.

Watch

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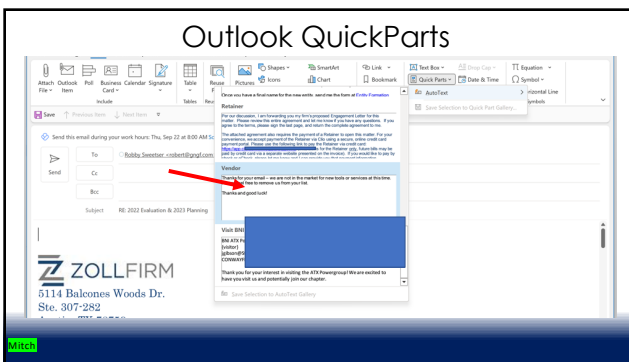
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### Outlook QuickParts



Watch

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### Quickparts AutoText in Word

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

Watch

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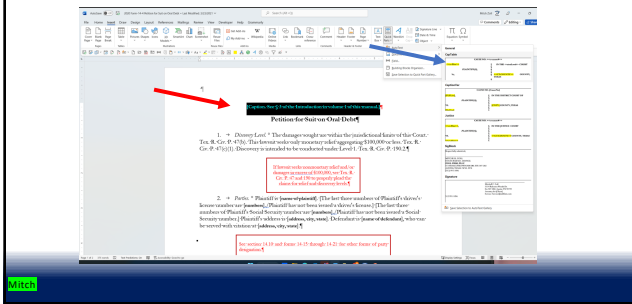
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## Word Examples



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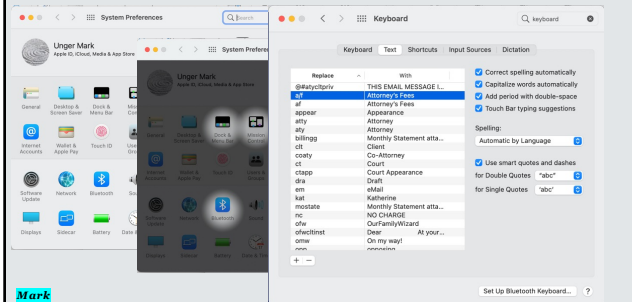
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## "Managed Automation" (MIU): MAC Snippets (auto expand keystrokes to words, phrases)



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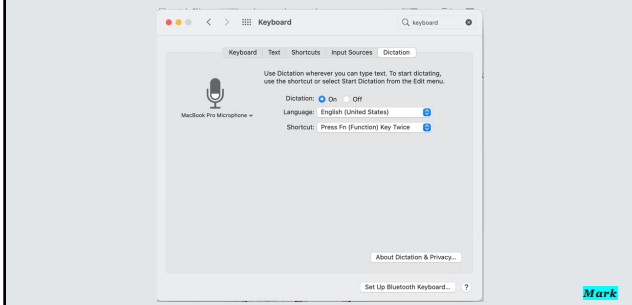
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## Bonus PT: Dictation (Baked into iOS/ Mac and iPad via Fcn x 2)



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Bonus PT: Dictation (Some limited functionality within Windows but... See Dragon (Dictation) Professional  
Use voice typing to talk instead of type on your PC

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



Windows Speech  
Recognition  
Computer software ⓘ

Mark

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AI Practice Tip: Voice to Text

· Otter.AI



Mark

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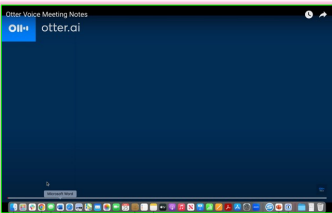
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Otter.ai



- Records, uploads, gives you rudimentary transcription;
- Then, take that doc or copy/paste into GPT and ask for Meeting Notes; or
- ASK OTTER TO FOR —
  - ID Speakers
  - SUMMARY; copy/paste any portion of those summary notes

Mark

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## Voice Transcription (zoom hearings, depositions; + Issue Coding

- Use Case
  - \*. Depositions
  - \*. Hearings
  - \*. Arbitrations
  - \*. Billing!!! w/ #Hashtags
- Functionality
  - \*. Issue Coding
    - \*. Initial Issue ID
    - \*. Hearings (Dir/Cross)
    - \*. Auto Cross Creation
    - \*. Segregation of A/F when seeking from Judge (ie Discovery/ etc)

Mark

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## Voice Transcription (zoom hearings, depositions; + Issue Coding

- Recipe: Talk 2 Me Linguini
- Dish: Transcript Used for Later Cross / Serving up Case on a platter;
- Ingredients:
  1. Pre Created Issue Codes;
  2. Recording of Depo or Hearing (w/Perm)
  3. SpeakWrite – App for upload for approx. 3 hour turnaround transcription; (request also in ascii / .txt format)
  4. TranscriptPad -

Mark

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## TextExpander: Text 2 Text etc.

<https://textexpander.com/>

Keyboard shortcuts and snippets will fill in recurring text - \$3.33/month



PRICING | DOWNLOAD | SUPPORT | FEATURES

Gather, perfect, share your knowledge.  
Recall your best words. Instantly, repeatedly.

AI PT: Repetitive Summary Functions

Mark

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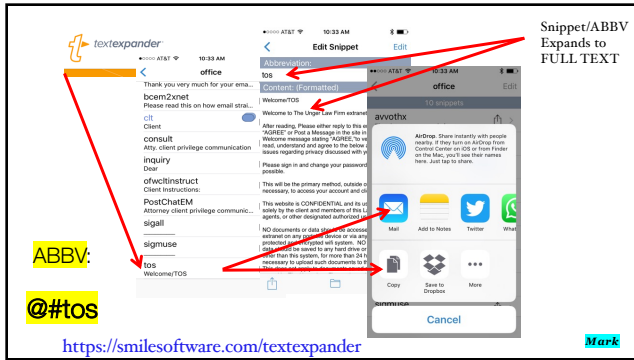
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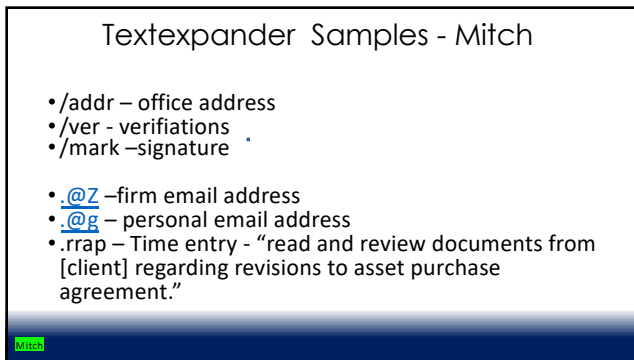
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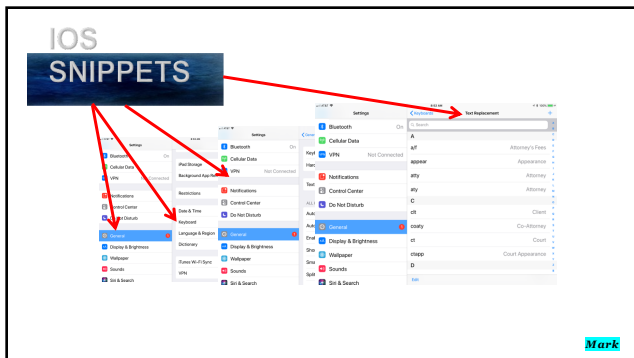
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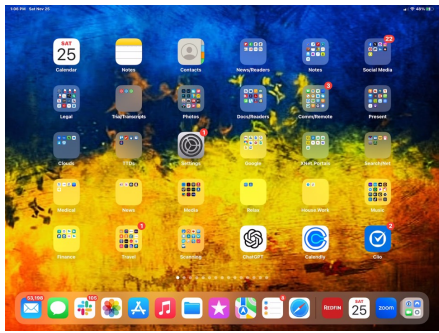
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AI Practice tip:  
copy statute  
drop into chat  
gpt and  
summarize for  
client!!!

Mark



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AI Practice tip: copy CUSTOM CLAUSE IN  
MEDIATION AND drop into chat gpt and  
summarize for MSA!!!  
  
SAVE INTO TEXT EXPANDER FOR  
FUTURE USE W/ COUPLE KEYSTROKES

Mark

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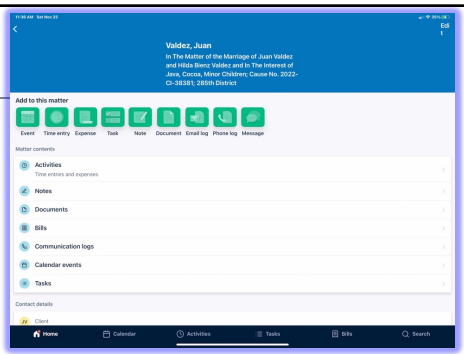
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Time Entry  
Workflow  
w/Snippets  
(expanding  
abbvs)

Mark



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## The Bootcamp

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**Automation**  
**Managed automation**  
**Artificial intelligence**

Mitch

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## Calendaring

**Still RELEVANT**  
**Still RELEVANT**  
**Still RELEVANT**  
**Still RELEVANT**

Mark



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## MS 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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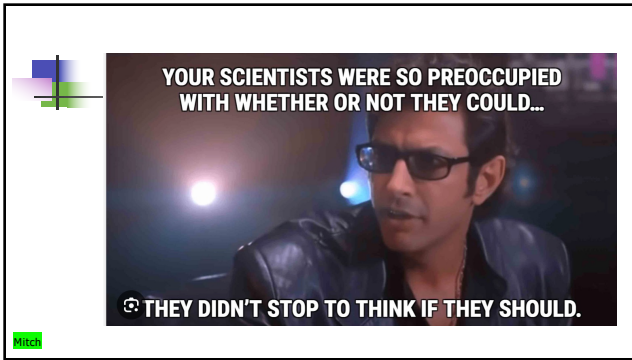
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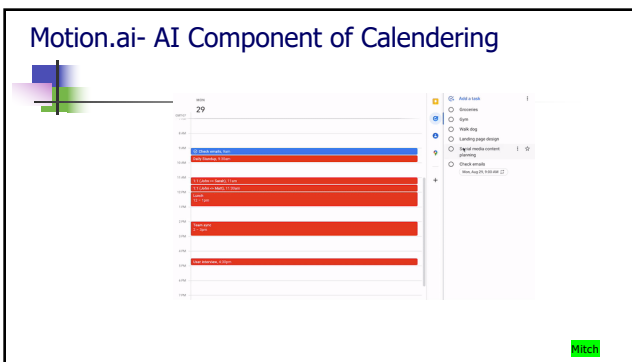
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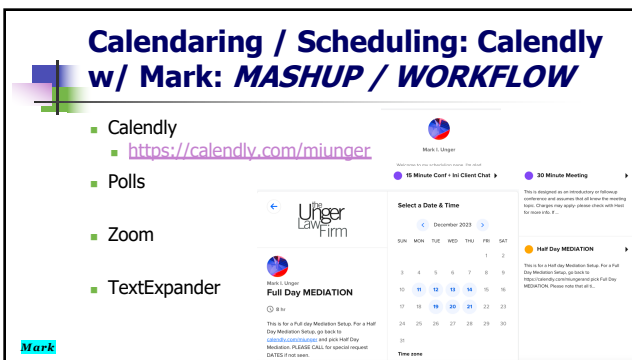
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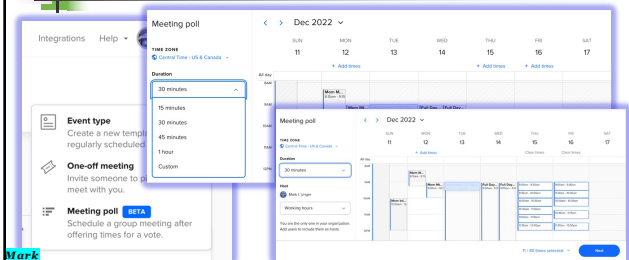
## Use Case: mark i unger

<https://calendly.com/miunger>

Mark

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## Meeting Poll: All Attorneys Vote on When



50

## The Bootcamp

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**+** Automation  
Managed automation  
Artificial intelligence

Mitch

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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).

Mitch

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*Real Time Auto Correct w/ Grammar correction*



Mark

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## 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

Mitch

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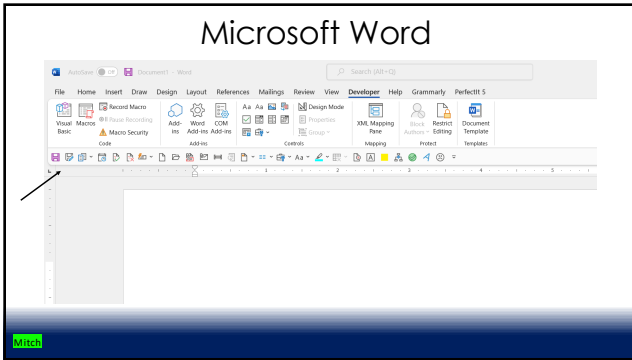
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## Word Tools For productivity

**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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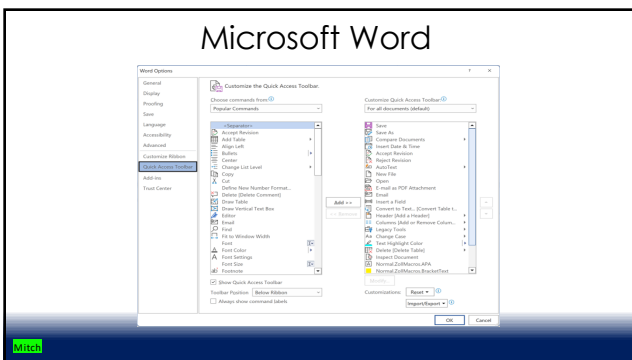
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## Macros

### 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

Mitch

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## Toolbars & Macros in Action

# Toolbars & Macros in Action

The image displays a Microsoft Word interface with several custom toolbars and macros. The ribbon at the top features buttons for 'Date update', 'Form Delivery', 'Form State & Italics', 'Leading space', 'Citation Form Error', 'Live Link', and 'Form Contact info'. The status bar at the bottom left shows 'cc:0/0/0/0'. The right sidebar contains six items: 'Comic Sans', 'Smart v. Straight Quotes', 'Citation Format Error', 'Citation Format Error', 'Double Space after \*\*', and 'Old Courthouse Address!'. The main document area shows a snippet of text with various formatting and macro-related elements, including a 'Date update' button, a 'Form Delivery' button, a 'Form State & Italics' button, a 'Leading space' button, a 'Citation Form Error' button, a 'Live Link' button, and a 'Form Contact info' button. The text also includes a 'Date update' button, a 'Form Delivery' button, a 'Form State & Italics' button, a 'Leading space' button, a 'Citation Form Error' button, a 'Live Link' button, and a 'Form Contact info' button. The text also includes a 'Date update' button, a 'Form Delivery' button, a 'Form State & Italics' button, a 'Leading space' button, a 'Citation Form Error' button, a 'Live Link' button, and a 'Form Contact info' button.

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[illegible]

60



## How to use ChatGPT with word

"clean up the OCR Errors in the following paragraph"

In the event of a termination of this Contract prior to any release of the Initial Deposit or any Additional Deposit in accordance with the other terms of this Contract, the Initial Deposit, including all interest thereon, or any applicable Additional Deposit, as the case may be, shall be released by Title Company to the party entitled thereto pursuant to the terms of this Contract. The tax identification numbers of the parties shall be furnished to Title Company upon request. If either party makes a written demand upon Title Company for payment of any of the Deposits other than in strict accordance with the terms of this Contract, then Title Company shall give written notice to the other party of the proposed payment. If Title Company does not receive such other party's written objection to the proposed payment within five (5) Business Days after the giving of such notice, Title Company is hereby authorized to make such payment.

Mitch



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## ChatGPT

### Post-ChatGPT:

In the event of a termination of this Contract prior to any release of the Initial Deposit or any Additional Deposit in accordance with the other terms of this Contract, the Initial Deposit, including all interest thereon, or any applicable Additional Deposit, as the case may be, shall be released by Title Company to the party entitled thereto pursuant to the terms of this Contract. The tax identification numbers of the parties shall be furnished to Title Company upon request. If either party makes a written demand upon Title Company for payment of any of the Deposits other than in strict accordance with the terms of this Contract, then Title Company shall give written notice to the other party of the proposed payment. If Title Company does not receive such other party's written objection to the proposed payment within five (5) Business Days after the giving of such notice, Title Company is hereby authorized to make such payment.

Mitch



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## The Bootcamp

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**+** Automation  
Managed automation  
Artificial intelligence

Mitch

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Chat GPT Use Case Adv PT: Image to Text (Holiday Visitation)

ChatGPT 4

You

Message ChatGPT...

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- Dad: Even years
- **Letter Day**
  - Mom: Even years
  - Dad: Odd years
- **Thanksgiving**
  - Mom: Even years (as per court)
  - Dad: Odd years (as per court)
- **Christmas**
  - Mom: Odd years (as per TFC §53.240)
  - Dad: Even years (as per TFC §53.240)
- **General Considerations**
  - The schedule is determined by working backwards from standard holidays such as

**Holiday Possession Schedule**

Overview: The holiday possession schedule alternates between parents in even and odd years. This is designed to ensure equitable time sharing for both parents during significant holidays.

1. **Alternating Holidays in Even & Odd Years**

**Example:**

- Mom: Odd years
- Dad: Even years
- **Memorial Day**
  - Mom: Odd years

**Christmas and Thanksgiving**

\* All arrangements are in line with the Texas Family Code (TFC) Section 53.214, as indicated in the graphic.

I hope this provides a clear outline based on the graphic. Remember, it's always a good idea to review any legal outline with your client and ensure it aligns with their understanding and the legal standards in place.

**ChatGPT 4**

you are a good supporter and attorney please create an outline of the holiday possession times based on the graphic

**ChatGPT**

Certainly! Here's an outline based on the graphic:

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ChatGPT

ChatGPT use case/workflow: Statutes

ChatGPT use case/workflow: Caselaw

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## Top Tech Tips for the Bootcamp

*Tips to implement today for more efficient and effective legal services*

- **Calendar**ing and Task Management—rules-based calendaring, and deadline management and case Tasks
- **AutoText**— Reduce errors and efficiently respond to communications; build document automations
- Document Formatting and tips – The automated creation and population of specific court forms and filings
- **Acquisition Tools** – Acquiring information from your clients
- **Billing/Fee Collection** – using snippets and links to send invoices
- **Obtaining Evidence (texts)** – Tools to collect client text evidence for the litigators

**Mich**

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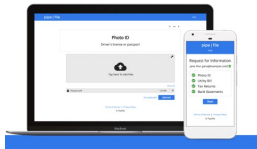
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## PipeFile



**Collect client documents for transaction and litigation matters**

- ☐ Avoid email back and forth
- ☐ Validate/confirm documents or send back to client to revise
- ☐ Set templates of required documents for matter type
- ☐ Load files from computer and phone

**Mich** **COMPUTER & TECHNOLOGY SECTION**

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## COMPUTER & TECH SECTION APP

(FREE TO SECTION MEMBERS)  
STATE BAR OF TEXAS  
2023  
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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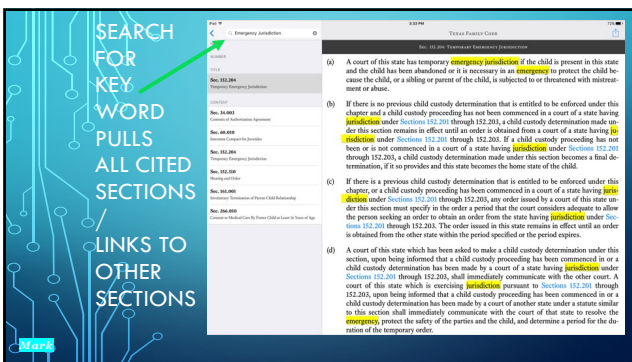
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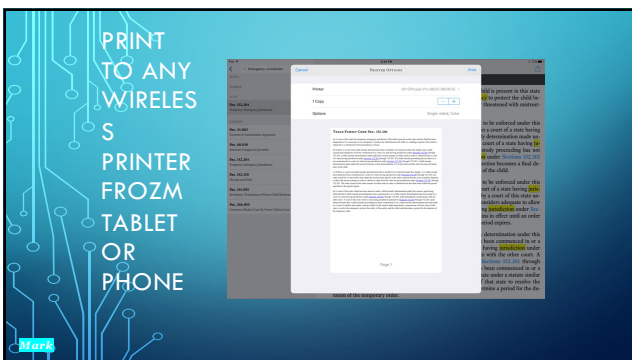
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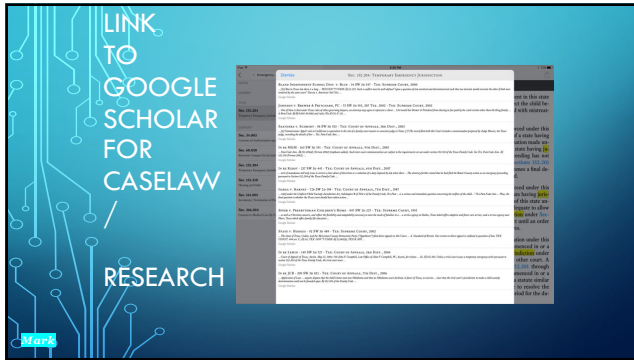
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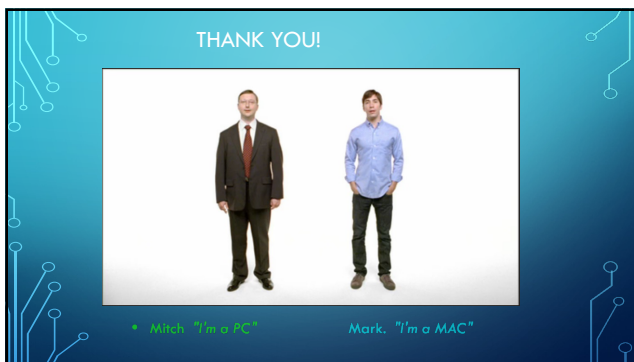
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