

Harnessing Technology To Be More Efficient and Avoiding the Multitasking Distraction

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1. HOW TECHNOLOGY PUNISHES LAWYERS:

- A. **Everything Happens Faster:** The practice of law has sped up significantly in the last 30 years, and technological advances are largely responsible for this. Thanks to faxes, email, cell phones and even instant messaging, communication lines are open all the time. Information we used to fill out request forms for and wait (during normal business hours) is now available on the Internet 24 hours a day. Tens of thousands of cases and statutes can be searched with the click of a mouse. Transactions that used to take two weeks to pull together now come together in a few hours. Computers enable us to handle more work with fewer people; and mobile technology (such as a laptop and handheld computers) enables us to work almost anywhere, anytime.
- B. **We Handle More Work Because We Can:** As a result of the foregoing, law firms and legal departments today handle a much higher volume of cases and often bring them to resolution much faster than could have been possible 30 years ago. Generally speaking, the average firm/legal department in 2016 handles more cases, has more files and generates more documents than could have possibly been imagined in 1986. Therefore, the problem of juggling an ever increasing number of active matters has become more acute. While technology has provided many benefits, it has also increased the speed and complexity of our practices and our lives. More importantly, this trend continues to accelerate.
- C. **We Must Deal With Way Too Much Information:** Because it is so easy to communicate thanks to technology, we're buried on a daily basis with more communications than we can digest or address. We receive a torrent of email, phone calls, text messages and other communications via social media. Not only is it all a huge distraction, it's also very easy to lose track of all of these things. The sheer number of unaddressed communications requiring an affirmative response are a key cause of stress for many lawyers.
- D. **We're Being Buried In Paper:** Thanks to high-speed copiers (the double-edged sword of technology), we're burying ourselves in paper. Because it's so easy and fast to make lots of copies, that's exactly what we do. As a result, extra copies are routinely made of every document, case files contain duplicates and triplicates of many documents, non-paper documents (like email) are printed and added to files, and the "paper trails" are not only complete, but deep. As a result of all of this, each case file has more paper associated with it than ever before. The combination of a) more paper per case file and b) higher case volumes has resulted in an exponential increase in the amount of paper lawyers manage. We're all straining under the weight.
- E. **Technology Disconnects Us From Processes:** When technology first starting to infiltrate the practice of law, the conventional wisdom was to let the support staff handle the technology so the lawyers could focus on lawyering. At the time,

most people thought the technology was just going to create a faster way to get from point A to point B. In other words, the technology would just raise the speed limit. However, the technology not only provided a faster path between point A and B, it created an entirely new process as well. When processes change, lawyers often find themselves in the position of not knowing how to do something they used to do regularly. For example, filing a pleading used to involve paper copies and a walk to the court. Now the pleading is an electronic PDF document and a user name and password are required to log onto the court's website so that you can identify the case and upload your pleading. Electronic case filing is a perfect example of not only speeding up the process but also changing to the point of it being unrecognizable to many lawyers.

- F. **Technology Creates Dependency:** For example, I worked with an estates and trusts lawyer (we'll call him Rick for purposes of this story) who was being held hostage by a bad support staff person (who we'll call Shirley). Shirley's performance had degraded along with her attitude over the years. She was doing a terrible job, causing problems at the office and being very unprofitable to the firm. However, Rick had relied upon her for so long to handle the day-to-day operations of his practice area that he had no idea how to do any of it anymore. Shirley used one program to generate probate forms and another for tax returns. Neither program was installed on Rick's computer, he didn't know the first thing about how to use them and didn't even know the logon and passwords. The probate processes Shirley knew how to navigate Rick hadn't done for so long that he didn't even know where to start. Rick would simply dictate instructions for new estate plans and Shirley would generate the documents. However, Rick didn't have any idea where the templates were that Shirley used and he had no skill whatsoever with the word processor. As a result of all of this, Rick was scared to part ways with Shirley even though he knew he needed to and his partners at the firm were insisting upon it. Rick was extremely uncomfortable with the dependency he felt on Shirley; and Shirley knew he was dependent upon her and that she could therefore get away with things that would have resulted in the immediate termination of her co-workers.
- G. **Technology Yanks Us From Our Comfort Zone:** Almost everyone can point to a situation where they finally understood how to use a piece of technology and then the technology was upgraded or replaced (taking them back to square one). If you upgraded from Word 2003 to one of the newer versions, switched from WordPerfect to Word, switched from Windows to Mac, or bought a new smartphone, then you're probably familiar with the feeling that you have been yanked from your technological comfort zone. The hard fact is that technology constantly changes over time. If you cling to old technology too long, it will no longer be supported or even safe to use (think Windows XP).
- H. **We Are Perpetually Connected:** With smartphones, tablets and computers always nearby and connected to email, texting and social media, it's easy to feel like you can't escape being reachable by almost anyone at any time. For many lawyers, this means we get almost no real downtime.

2. **STRATEGIES FOR AVOIDING TECHNO-PUNISHMENT AND GETTING THINGS**

DONE: Here are some ideas to help with this issue.

- A. **Simple Is Good:** Remember that high power and functionality almost always go hand-in-hand with complexity. If you have simple needs, think twice about buying something that overshoots those needs.
- B. **Don't Buy Technology Based Upon Feature Lists:** The only thing that matters is what YOU can do with the technology; not what the technology is hypothetically capable of in a perfect world that doesn't actually exist. If tapping the potential of a particular technology is too difficult, then you paid for functionality you can't take advantage of. See Simple Is Good above.
- C. **Use As Few Individual Tools As Possible:** For example, some law firms/legal departments use Outlook for email/calendar, another program for CRM¹, one program for billing (such as Timeslips) and a different program for the rest of the accounting function (like QuickBooks), another database for case management, and another program for document management. Those firms would be much better off with a single case management program that performs all of those functions; or a smaller set of programs that can share data so that information must only be entered once. Just because you find yourself with a 100 piece puzzle doesn't mean you can't trade it in for one with 10 pieces (or 1). This concept also applies to hardware. I meet lawyers who have a desktop PC at the office, also carry around a laptop, an iPad and two phones (one office phone and one personal phone). This seems pointless to me. Consolidate where you can.
- D. **Connect Your Data:** In many cases, lawyers use programs which can link to one another and share data. It is surprising to me how often this linkage is never established.

For example, Amicus Attorney (see www.amicusattorney.com) is a popular legal matter management application and PCLaw (www.pclaw.com) is a popular legal accounting application. Hundreds of law firms use both programs. There is an excellent, two-way link between Amicus Attorney and PCLaw so that client and accounting information can be entered in either program and seamlessly transmitted to the other. In spite of this wonderful functionality, many law offices using both programs have never bothered to establish the link between them. Therefore, an enormous amount of information must be entered manually into both programs. This is not only expensive and inefficient, it also significantly increases the margin for transcription error when the same information must be manually re-entered.

If you are aware of a data link between programs you're using, then stop wasting time and money - enable the link! I know this seems obvious, but you would not believe how many firms have programs that *could* share data, but the feature is never taken advantage of.

¹ CRM = Customer Relationship Management

- E. **Use The Right Tool for the Job:** For example, I can get an iPad, an external keyboard, an app such as Pages² for word processing and apps like PrintCentral or AirPrint for printing from the iPad. I could ostensibly use all of those things to draft legal documents for my practice. On the other hand, I could also get a notebook with MS Office which would have a 15" screen rather than a 9.7" screen, a better keyboard, vastly more storage, an optical drive, USB ports, a faster processor and the ability to load all of my favorite programs I've been using for years. It would offer much better functionality, versatility and it would likely cost LESS than the iPad and accessories. In my professional opinion, that's a perfect example of how using the right tool is easier, less expensive and involves less pieces and parts. iPads are great consumption devices; but they're not so great for creating content and creating content is the primary task for most lawyers.
- F. **Get Training for Everything:** See "Feature Lists Are Irrelevant" mentioned previously. If you have invested in technology, then invest in the training necessary to maximize its utility. The best bang for your technology dollar is to learn to use what you already own rather than spending more money on new technology you will also underutilize.
- G. **Build a Technology Plan for Your Office:** Feeling technologically adrift is stressful and it's time you stop letting technology just happen to you. You can accomplish this by building a plan and moving ahead with purpose. Otherwise, you're putting yourself at a competitive disadvantage; and the farther behind you fall, the more expensive it is to catch up. More importantly, waiting for your current technology to die before you replace it is the most expensive possible way to handle upgrades.
- i. **Objectives of a Technology Plan:**
- a. **Replace It Before It Dies:** Schedule and budget for the replacement of old technology before it dies.
- b. **Identify and Fix Broken Processes:** There are almost always ways to improve work-flow and administrative processes in a law firm or legal department. The protocols in use are often arrived at organically and it's not uncommon for participants to have no idea why things are done a certain way ("that's just the way we've always done it!"). This is an important first step because nothing constructive occurs if you try to automate (or throw money at) a broken process. How do you know this might be an issue in your office? If, for example, you can answer "yes" to any of the following questions:
- (1) Do you suspect that the work in your office could be done more efficiently or faster?

² See <http://tinyurl.com/89n9rmz> for more information.

- (2) Do you feel your office is always struggling to catch up or keep up with the workload?
- (3) Are you frustrated with how long it takes to find information you need?
- (4) Do you feel that too much time is spent on the accounting process?

- c. **Become Technologically Proactive:** Most law offices employ the break/fix technology model. In other words, when something breaks, it is fixed or replaced; but rarely is anything done to proactively improve the practice. The break/fix model serves only to keep an office in the same technological position; but it does nothing to improve things.
- d. **Identify & Eliminate Speed Bumps:** Identify bottlenecks, problems & needs so you can start devising ways to fix or address them.

ii. **Elements of a Technology Plan:**

- a. **Inventory:** Create an inventory of everything you have - hardware, software, printers, scanners, copiers, etc. The inventory should contain manufacturers, models, serial numbers, and dates of acquisition.
- b. **Process Maps:** A written description or map of your main business processes, protocols and procedures. This will help you identify bottlenecks, problems and needs. Remember that just because that something has always been done a certain way doesn't mean it has to continue being done that way.
- c. **Solutions:** Possible solutions to the problems and issues discovered.
- d. **Training:** Training for all possible solutions must be a part of your plan. If you can't afford training, then you can't afford the technology.
- e. **Schedule It:** Schedule for implementation of solutions, upgrade or replacement of hardware/software.

H. **Stop Accepting Your Own Tech Ignorance:** Many lawyers describe themselves as technologically deficient, techno-luddites, even tech adverse. They'll tell me things like "I'm easily the least tech savvy person in this office" with a tone of indifferent resignation. I always ask why they don't try to learn more about the technology used by others in their office, and I've heard the following responses:

- "I didn't grow up with that stuff and it's too late to learn it now."
- "I don't need to know that stuff - I hire people to do it for me."
- "I don't have time to learn it."
- "Whatever - I'm going to retire in a couple of years anyway."
- "I'm totally not interested in trying to sit down and figure out some techno thing. If I wanted to be a computer jockey, I would have taken a totally different track with my career!"

The reality is that age and/or a lack of prior experience does not destroy one's ability to learn something new about technology. If you want to stop relying on others, learn to be more self-reliant and increase your efficiency, then you need to engage in ongoing learning. See Strategies for Learning New Technology in paragraph 4. below.

3. **STOP TRYING TO MULTITASK:**

- A. **Multitasking Defined:** It can mean performing two or more tasks simultaneously, or it can also involve switching back and forth from one thing to another. Multitasking can also involve performing a number of tasks in rapid succession.³
- B. **The Multitasking Problem:** The research on this subject clearly indicates that most human beings are fairly terrible at paying attention to more than one thing at a time. Of course, there are a tiny few "supertaskers" among us who can actually do this, but they are very rare.⁴ In most cases, the old proverb holds true - If you chase two rabbits, both will escape. The big problem here is focus. We are constantly interrupted due to technology (such as email) and technology is also a terribly tempting thing (such as the Internet) when you're trying to complete a task involving something you don't really like. So I view multitasking as a trap. Intellectually, I know I'm terrible at trying to do two things at once; and yet I'm constantly tempted to do it. Sometimes, I unwittingly get sucked into it, have to reel it back in and get re-focused on what I was really trying to accomplish.
- C. **Comments from Experts About Multitasking:** Here are some good quotes on the subject.
- i. "Yet, the research demonstrates that when someone multi-tasks work actually takes longer and the quality is inferior. A 2005 study by Hewlett-Packard found that workers who were continually distracted by e-mail and

³ "The Cognitive Costs of Multitasking" by Kendra Cherry - see <http://tinyurl.com/y4ycm69>

⁴ For more information on supertaskers, see [Supertaskers: Profiles in extraordinary multitasking ability](#) by Jason M. Watson and David L. Strayer, University of Utah, Psychonomic Bulletin & Review, 2010, 17 (4), 479-485.

phone calls showed an effective drop in IQ equal to twice that of those using marijuana."⁵

- ii. "Studies have shown time and again, that working on a single task in isolation yields vastly better results and in a shorter time frame when frequent context switches are avoided. This can be further optimized by training in concentration techniques, such as breath meditation, autogenic training or muscle relaxation."⁶
- iii. "There has been a lot of research on task switching. Here's what we know from the research:
 - It takes more time to get tasks completed if you switch between them than if you do them one at a time.
 - You make more errors when you switch than if you do one task at a time.
 - If the tasks are complex then these time and error penalties increase.
 - Each task switch might waste only 1/10th of a second, but if you do a lot of switching in a day it can add up to a loss of 40% of your productivity."⁷
- iv. "If you're one of the 50 percent of people who listen to music at work, you probably think it helps you focus. But if you strapped yourself up to a brain scanner, you'd find just the opposite. Music is designed to engage your body and mind through your limbic system: 'the part of your brain that is always on the lookout for danger, food, sex, or shiny things,' explains FocusAtWill⁸. It engages your emotions and urges you to dance, siphoning away mental resources."

D. **Reading Material on Multitasking:** I don't expect you to take my word for it so if you're interested, here are some things to read on your own:

- i. The Myth of Multi-Tasking by Rich Largman, February 22, 2011 - see <http://tinyurl.com/cxv9rep> (this is really good and summarizes the problem of technology and multi-tasking).
- ii. The Power of Prime - The Cluttered Mind Uncluttered, by Jim Taylor, Ph.D., March 30, 2011 - see <http://tinyurl.com/3enenqs> from Psychology Today.

⁵ "The Myth of Multi-Tasking" by Rich Largman, February 22, 2011 - see <http://tinyurl.com/cxv9rep>

⁶ "Human Multitasking" by Tim Janik - see <http://tinyurl.com/6567c2m>

⁷ "The True Cost of Multi-Tasking" by Susan Weinschenk, Ph.D., September 18, 2012, published in Brain Wise - see <http://tinyurl.com/8ajprhr>

⁸ See <https://www.focusatwill.com/>

- iii. The True Cost Of Multi-Tasking, published on September 18, 2012 by Susan Weinschenk, Ph.D. in Brain Wise - see <http://tinyurl.com/8ajprhr>.
- iv. Brain Rules: 12 Principles for Surviving and Thriving at Work, Home, and School, by John Medina, February 26, 2008.
- v. The Myth of Multitasking: How "Doing It All" Gets Nothing Done by Dave Crenshaw, August 18, 2008.

E. Strategies for Avoiding the Multitasking Trap:

- i. **Turn Off Notifications:** Email is a huge distraction. Whatever email application you use, try turning off all notifications of incoming email so you're not tempted to stop what you're working on to read it. Set times during the day when you check email that don't conflict with other commitments or tasks. If you have a smartphone, turn off notifications for email on it as well. There's no reason for your phone to be vibrating incessantly all day every time an email comes in.
- ii. **Try Batch Processing:** If email is a huge distraction for you like it is me, try carving out a specific chunk of time to attack the pile of unread email. Spend 30 minutes and then leave it alone for several hours. Knock out as much as you possibly can during that time and don't extend it. Afterwards, go back to more productive pursuits.
- iii. **Track All of Your Time - Even the Non-Billable Time:** If you become aware of how long it actually takes you to deal with distractions like cleaning out your inbox, it can help you focus on those tasks and complete them more efficiently.
- iv. **Leave Blank Spaces:** "The research on creativity tells us that it is the pre-frontal cortex that puts ideas together. But the pre-frontal cortex can only work on one thing at a time. When you are multi-tasking you are taxing your pre-frontal cortex. You will never solve problems if your pre-frontal cortex doesn't get quiet time to work on integrating information. This may sound paradoxical, but if you STOP thinking about a problem or particular topic you will then be able to solve it! This means you have to make time for blank spaces in your day. You need to have time in your day when you are doing "nothing" as far as your brain is concerned. Not talking, not reading, not writing. You can go for a walk, get exercise, listen to music, or stare into space. The more blank space the more work you will get done! Multi-tasking is the enemy of blank space."⁹

⁹ "The True Cost of Multi-Tasking" by Susan Weinschenk, Ph.D., September 18, 2012, published in Brain Wise - see <http://tinyurl.com/8ajprhr>

- v. **Silence is Golden:** There is a lot of research indicating that listening to music (particularly popular music with lyrics) interferes with cognitive tasks and reading comprehension. Turn it off to help your focus.
- vi. **Carve Out Time and Set Your Phone to Do Not Disturb:** If you have something you need to get done, it's a good idea to make an appointment on your calendar for it and dedicate that time solely to the task at hand. Turn off your phone and instruct others to leave you alone while you work. Success with this depends upon you setting boundaries with others and exercising self-discipline.
- vii. **Shut Down Social Media While You're Working:** This may seem obvious, but there are lots of lawyers who monitor Twitter and other social media while they're "working." Don't think this isn't distracting you and impacting your productivity.
- viii. **Try Solitude:** When I need get serious work done, I isolate myself outside of the office. Usually, that means I work from home in the den with doors closed. No phone, email not even running, and no music. I feel I can get more done on a single task in one hour of isolation than I do in 5 hours at the office.
- ix. **Noise Pollution Solution:** If you're in an environment with high ambient noise, consider sound-blocking headphones. They block the ambient noise and the only thing you hear is the music you're piping in. Keep in mind the warning above about when listening to music can impair your performance. In the alternative, try www.simplynoise.com or <http://rain.simplynoise.com> (I personally LOVE these sites).
- x. **Have "Laptopless" Meetings:** This means that laptops (as well as other mobile devices like tablets and smartphones) are banned. Let me tell you, this works!

4. **STRATEGIES FOR LEARNING NEW TECHNOLOGY:** There are several reasons lawyers don't adopt new technology even though they're certain it will help. Of course, a big reason is that there isn't budget for the new technology. Not much can be done about that. However, another big reason is that new technology has an uncanny ability to make smart people feel stupid (and no one likes to feel that way). It's frustrating to try and figure new things out; and at least for me, the older I get, the more frustrating it becomes. I am a certifiable nerd and a big part of me LOVES new stuff. However, I can't deny that another part of me dreads it. I doubt that I'm alone in that sentiment. Moreover, if you're not a "techie," then the part of you that loves new stuff is probably a lot smaller than the part of you that dreads it. As you can tell, I'm no psychologist, but hopefully my amateur analysis makes sense.

A. **Generational Differences:** Baby Boomers were born from 1946 - 1964; Generation X is considered 1965 - 1980; and Generation Y is considered 1981 to 1990.

- i. The reality is that most Baby Boomers never saw a computer in undergrad or law school.
 - ii. Early Generation X members also didn't encounter anything resembling a modern computer while they were in school. Late Generation Xers have had technology most of their lives.
 - iii. Generation Y members have known modern technology their entire lives.
- B. **Defining the Legal Tech Generational Divide:** While the foregoing is useful for broad classification purposes, the real dividing line seems to be lawyers born prior to 1966 (the first year of Generation Y). For those individuals, the great technological revolution occurred after they were already practicing law and had little time to learn how to use these new tools. As a result of these and other factors, attorneys born before 1966 *tend* to be less tech savvy than those younger than them. The older you go in age, the worse the problems become (generally speaking, of course). I'm stereotyping and you might not fit these classifications so please don't be offended if you don't.
- C. **Generational Differences In The Way We Learn:**
- i. **Boomers Like Manuals:** There seems to be a fair amount of empirical evidence and studies which support the following:

"Boomers are auditory and visual learners while Xers and Net Geners (Generation Y) are tactile learners. When Boomers get a new gadget their first step is to read the manual. The younger generations just start hooking up wires and pressing buttons. Manuals? They are for 'old folks.'"¹⁰
 - ii. **So Where The Heck Are The Manuals?** Generally, manuals are not included with new technology or they're woefully inadequate. Here's a few ideas for getting something to read:
 - a. **Manufacturer Web Sites:** For example, if you buy a new Droid smartphone, you're going to get a 3 x 4 inch booklet with the phone which contains about one sentence per page and fails to provide any useful help. However, if you go to the manufacturer's website, you can download a 154 page manual with a huge table of contents and full size pages. Why doesn't it come with the phone itself? Probably because they felt it was too expensive to print it.
 - b. **Explanatory Web Sites:** For example, my upgrade to Adobe Acrobat X came with no manual at all. However, I can find

¹⁰ Larry D. Rosen, Ph.D., *The National Psychologist*, March-April 2004 - see <http://www.technostress.com/tnp45.htm>

instructions for just about anything imaginable on the Acrobat for Legal Professionals¹¹ web site.

- c. **Third Party Manuals:** Let say I upgraded to Outlook 2010 and need help. I could always buy Outlook 2010 Inside Out¹² and find answers to all of my questions.

D. **Action Plans for Getting Comfortable With Unfamiliar Technology:**
Obviously, these are applicable regardless of your age or generation.

- i. **Baby Steps:** Many of the technology pieces we have access to are capable of many, many things and they seem a bit overwhelming. You attack these things one little bite at a time. For example, let's say you have a Galaxy S7 smartphone. It's easily one of the most technologically advanced phones ever made. So how do you break it down? I like to check the manufacturer's website to see what kind of manuals or feature tours they have there. In that way, I can see what it's capable of and start choosing features I want to master. So let's say I want to figure out the sophisticated camera built into the phone. I simply google "galaxy s7 camera" and there are many hits, one of which is "Samsung Galaxy S7 Camera Performance Rings A Death Knell For The Point And Shoot"¹³ on www.forbes.com. This article explains what the camera is capable of (basically anything) and gives me a list of features I want to explore.

So take a day and experiment with just the camera and see what you can learn. Next week, pick another feature and master it in the same manner. The more you learn, the easier it is to pick up new things with the same device.

- ii. **Read The Manual!** Here's the deal - those younger folks who think they can master every piece of technology by just playing around with it are dead wrong. That may be true for something simple like an iPad, but it's absolutely *not* true for complex technology like a word processor. For example, even the most tech savvy 25 year old lawyer is never going to figure out everything they need to know about how to control complex formatting in Microsoft Word by simply using it. So if you read a manual on the technology you're using, you are actually creating a distinct competitive advantage over those who refuse to read manuals because you'll have a much better understanding of what your technology can do for you. Remember, what technology is theoretically capable of is irrelevant in the real world. The only technological features and functions that matter are the ones you know how to use.

¹¹ See <http://blogs.adobe.com/acrolaw/>

¹² Microsoft Outlook Inside Out by James Boyce, Microsoft Press, 1st edition (August 18, 2010).

¹³ See <http://tinyurl.com/z2vs4se>

- iii. **Be a User:** Make an overt effort to start using the technology in your office and not rely on someone else to do it for you. Some examples:
 - a. Draft your own documents and learn more about the functionality of your word processor. If you can't type and want to learn how to, there are many ways to do it from buying a program like Mavis Beacon Teaches Typing¹⁴ to using web sites like <https://www.typingclub.com> or www.typing.com. If you are physically unable to type or just don't want to learn, then you can get Dragon NaturallySpeaking, speak to your computer and it will type what you say (for more information on this, see paragraph 6.N. below).
 - b. Look up your own information. If you need information that resides in a system in your office, learn how to look it up yourself rather than asking someone else to do it for you.
 - c. If you have a case management program that you barely touch, start using it more, ask existing users to give you a little instruction and take it in steps. For example, you might start with the calendar first - get comfortable with entering appointments and tasks yourself. Then move to contacts. Set up a new contact in the system and learn how to search for existing contacts.
- iv. **Get Training:** See paragraph 2.F. above. Whatever technology you're using, there are certainly off-site and possibly on-site options for training. If the training can be hands-on, it's even better. Regardless, it is worth the investment.
- 5. **JUST DO IT!** Most lawyers are already aware of the inefficiencies in their operations. If you have a lot of balls in the air, there are tools to help you juggle them without dropping one. If you can't find the information you need quickly, there are organizational and search utilities. If you're buried in paper, there are paper reduction systems. Whatever the issue, you're not the only one to experience it and there's at least a 90% chance that an off-the-shelf solution exists. So stop accepting the status quo, the "way we've always done it" and the inefficiencies you've always known about. Form a committee (if necessary), do the research and get the issues resolved! Set a deadline and work toward it. I know you're busy, but by doing nothing, you only create more work for yourself.
- 6. **TECHNOLOGY TOOLS TO MAKE LIFE EASIER ON YOU:** There are an overwhelming number of things one might use to make life easier. The following is a short list of recommendations.
 - A. **If You Have a Smartphone But Don't Have Wireless Sync:** If you use Outlook, then you just need hosted Exchange¹⁵ and this is easily and inexpensively

¹⁴ See <http://tinyurl.com/75zw6d5> for more information.

¹⁵ See <http://tinyurl.com/bleasx7>

acquired via Office 365. If you use Gmail but would prefer your email/calendar/contacts to be in Outlook, then you need Google Apps for Business¹⁶. If you use Google for everything, you can wirelessly sync iOS and Android devices for free. If you have a Windows Mobile phone, you need Google Apps for Business; and if you have a Blackberry, you need Blackberry Internet Service¹⁷. Regardless, at a minimum you should have wireless sync of your email, calendar and contacts on your smartphone. All of these are things you can set up yourself.

- B. **iTimeKeep Mobile Time Entry:** This is a mobile app that works on any iOS or Android device and will connect to many legal accounting programs. It's likely that you can enter time faster and easier on iTimeKeep than you can using your accounting program directly at the office. See <http://tinyurl.com/mm6lzu5> for more information. It links to:
- Elite[®] Enterprise, Elite[®] Webview, Elite[®] 3E, Aderant[®], Rippe & Kingston LMS, CarpeDiem[®] / TimeKM[®], DTE, Juris[®] LexisNexis, ProLaw[®], Omega[®], LawBase[®], Total Office (Former Client Profiles), Client Profiles Financial, TABS3[®], Amicus[®], LSS[®], Versys[®], ProVantage[®], PCLaw[®], Time Matters[®] & Equinox[®].
- C. **Hide My Ass VPN Service:** If you need to work with confidential client data, then it's definitely not a good idea to use a public WiFi connection with your laptop or mobile device. An easy way to protect yourself is Hide My Ass by AVG's VPN Service. For \$60/year, you'll be able to safely use any public WiFi connection safely. See <https://www.hidemypass.com/>.
- D. **Copy2Contact Outlook Utility:** If you've ever created a new contact in Outlook, then you know that there are a *lot* of little white boxes to complete. Copy2Contact allows you to select an individual's contact information at the bottom of an email and with one speed-key, it populates all of the fields in a new contact card in Outlook. I think it saves me 5 minutes every time I use it. Check it out at <http://www.copy2contact.com/>. Copy2Contact Pro is \$49.95/year.
- E. **WordRake:** Many lawyers are revisiting the language used in their documents to try and clean out the legalese and make them more understandable to a layperson. If you use Microsoft Word and would like to see how the language in your complex documents might be streamlined, consider WordRake (<http://www.wordrake.com/>). WordRake integrates with Microsoft Word (not WordPerfect, sorry) and will use Word's "track changes" feature to suggest changes to any document you would like it to review. At that point, you can accept or reject each change using Word's built-in features for that purpose. WordRake for Word is \$129/year and WordRake for both Word & Outlook is \$199/year.
- F. **Hightail:** See www.hightail.com. I frequently need to email a large individual file (in terms of bytes) or many files which add up to over 5 MB. As you are

¹⁶ See <http://tinyurl.com/9pv9hht>

¹⁷ See <http://tinyurl.com/r89tj>

probably aware, 5 MB is often the limit of the file sizes that email servers will accept. If you try to email something larger than that, it will bounce back to you with a delivery error. There is a wonderful service from www.Hightail.com which overcomes this problem *and* adds a few additional features lawyers find very useful.

- i. **Plans:** Here are your options. Discounts are available if you pre-pay for a year at a time.

Lite	Professional	Teams	Enterprise
<p>FREE</p> <p>\$0 forever</p> <p>Share files up to 50 MB</p> <p>2 GB of storage</p> <p>5 E-signatures</p> <p>Join free</p>	<p>\$15.99/m</p> <p>or \$159.99/year</p> <p>Share files up to 2GB</p> <p>Unlimited storage</p> <p>Unlimited E-signatures</p> <p>Buy now</p> <p>Free trial</p>	<p>Per User (2 - 100)</p> <p>\$24.99/m</p> <p>\$249.99/year</p> <p>Share files up to 10 GB</p> <p>Unlimited storage</p> <p>Unlimited E-signatures</p> <p>Buy now</p> <p>Free trial</p>	<p>Call for customized pricing options</p> <p>1 [866] 558-7363</p> <p>Customized sharing storage and support options to meet your business need</p> <p>Learn more</p> <p>Take a trial</p>

- ii. **Features:**
 - a. **Send Files:** Easily send and receive content with the comfort of email without the hassle of inbox limits.
 - (1) Simply send it: It's "email easy" from the web, desktop or mobile device.
 - (2) Big files, no problem: Send your big ideas without email limits on file size (up to 2 GB or 2,000 MB)
 - (3) Upgrade to business class: Online tracking, access control and security features included.
 - b. **Share Folders:** Wherever you go, there they are...cloud-based folders for you and your team, at work and on-the-go.
 - (1) Simply save it: Straight to your cloud folders, as you work, with unlimited storage.
 - (2) Work where you need to: Sync your files and folders for access offline and on mobile devices.
 - (3) Share the goodness: Easily invite colleagues and customers to share and collaborate.

- c. **Sign Documents:** Get business done online. Sign documents online with your keyboard, mouse or mobile touchscreen.
 - (1) Simply sign it: Sign right from your smartphone, tablet, web or desktop.
 - (2) Forget the fax: Sign the deals wherever you are, without the print and fax-it slowdown.
 - (3) Fill it out: Preview documents and fill out forms with typed text inserts.

iii. **Hightail Apps:**

a. **Desktop:**

- (1) **Desktop App:** Access, share and store content right from your PC or Mac. Any updates are instantly synced and available on all your other devices.
- (2) **Hightail Express:** Send and receive large files from your desktop in a snap. Track file downloads and stay in the know.
- (3) **Outlook Plugin:** Send large files and folders from Outlook with ease. Never worry about bounce backs again.

b. **Mobile:**

- (1) **iPhone:** Access files on the move. Share and manage content using only your touchscreen. Sign contracts, invoices and other documents.
- (2) **iPad:** Your digital world is at your fingertips. Access content, send files and folders, and close deals with our new native iPad app.
- (3) **Android:** Access your content anywhere. Manage files and folders. And apply e-signatures to documents with our new native Android app.

c. **Web:**

- (1) **Hightail.com:** Simply login to Hightail on any browser to send, share, sign, sync, and store your business content online.
- (2) **Yahoo! - Attach Large Files:** Use Yahoo! Mail? Then look for the little paper airplane and fly your files first class.

- (3) **Hightail Toolbar:** Send large files from the Hightail toolbar. Access stored online files; add e-signatures to documents. For PC browsers IE, Firefox and Chrome.

G. **VoIP Office Phone System:** I'm not a phone consultant, but you need to understand VoIP¹⁸ technology, what it is, and the benefits of it over a standard POTS¹⁹ system.

- i. **What Is VoIP:** Voice Over Internet Protocol simply refers to a telephone system that uses the Internet to transmit phone calls. In a physical office, your office phone plugs into a network jack (just like your computer) rather than a telephone jack. In a home office, the office phone plugs into your wired or wireless Internet router. Nothing extra is needed. For example, I can take a VoIP phone home, plug it into my home wireless router, and I'm instantly connected to our office phone system. I can also plug a phone headset directly into my computer to make and receive calls (using software that gives me a "softphone" option). VoIP gives you a dial-tone just like a POTS system and the phones work exactly the same way. However, you do need to acquire special VoIP phones if you don't want to use a softphone option. They're no more expensive than POTS phones and this link will take you to a good list of models and prices: <http://tinyurl.com/5qybbb>. However, VoIP providers typically have proscribed phones for use with their system which you can buy directly from the provider.

I use a headset attached to my computer (wirelessly, of course) from Plantronics that looks like this (and costs about \$160).

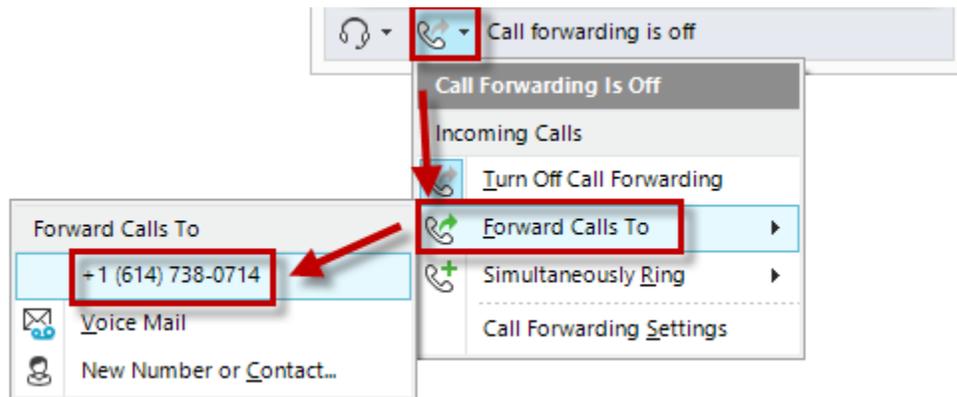


¹⁸ VoIP stands for Voice Over Internet Protocol.

¹⁹ POTS stands for Plain Old Telephone Service (not trying to be cute here, this is really the acronym the industry uses for referring to standard land-line phone systems)

- ii. **Why Businesses Are Switching to VoIP:** Rather than give you a bunch of marketing blather, I'll just explain the benefits that drove our own office to switch and why we would never go back to POTS.
- a. **Less Expensive:** VoIP plans typically include all long distance calls and every feature. So you just pay a flat fee per month, per phone and that's it.
 - b. **Amazing List of Features:** Most VoIP services include every phone system feature you've ever heard of as their standard offering. In most cases, you can't think of a feature that isn't standard.
 - c. **Easy to Use:** Each user can control their own system from a web page or application which shows their "dashboard." For example, I can login and I control anything I want about my phone. This means we don't have to call the "phone guy" every time we want to change something. For example, if I want to move an employee from one office to another, that used to take 3 days (for the phone guy to show up) and cost me \$150 for the service call. Now, we just move the employee's phone to the new office and plug it in. That's it. There's no complicated configuration that needs to occur for their direct dial and phone set up to follow their phone - it just does.
 - d. **Voice Mail from Anywhere:** I love this feature - all voice mails are automatically emailed to me as attachments. I can also retrieve voice mail from the Internet (any computer connected) or my phone. Now I never have to go through the annoying process of "dialing in" to retrieve my messages when I'm on the road.
 - e. **My Phone Can Travel With Me:** If I want to work from home, I can simply take my office phone home and plug it into my home Internet router and I'm hooked into the office instantly. In other words, direct calls ring at home, people can transfer calls to me at home and everything works just as it does when I'm physically in the office. I don't use this a lot but it has proven tremendously useful when I need it. I can also use my computer as my phone or forward all of my office calls to my cell.
 - f. **You Can Easily Have Multiple Offices On The Same System:** Since it all works through the Internet, it doesn't matter where your co-workers are physically located.
 - g. **Easy Call Forwarding:** I'm often out of the office for extended periods of time and prefer my office phone to auto-forward to my cell phone. Our old phone system allowed this, but I had to get out the manual and hit about 25 buttons on my phone to finally get it

done. This is typical and so complicated that no one does it. With VoIP, it's just 3 clicks:



- h. **Call Logs:** This doesn't sound like a big deal, but I find it extremely valuable that the VoIP system keeps a full log of all of my incoming and outgoing calls. I never lose a number thanks to this feature.
- iii. **VoIP Options:** Here are some options (there are many more than this):
 - a. **RingCentral** - www.ringcentral.com - we have had many clients tell us how much they like RingCentral.
 - b. **Proximiti** - www.proximiti.com
 - c. **Vonage** - <http://tinyurl.com/yg8h85y>
 - d. **Vocalocity** - www.vocalocity.com
 - e. **Jive** - www.getjive.com
 - f. **8 x 8, Inc.** - www.get8x8.com
 - g. **PBXtra** - <http://pbxtra.fonality.com>
 - h. **Easy Office Phone** - www.easyofficephone.com
 - i. **AVAD Technologies** - www.avadtechnologies.com
- H. **Internet Faxing:** Lose the fax machine! Internet faxing allows you to send and receive faxes via the Internet without paying for a phone line or owning a regular old fax machine. Your existing fax number can be transferred to most of the following services or you can get a new fax number. Incoming faxes are emailed to you as PDF attachments. You can send faxes from Outlook or from the service provider's website. Options for this include:
 - i. **RingCentral:** www.ringcentral.com. With RingCentral, you get a toll free or local number; you can receive faxes on your PC, via email or with a

mobile app; and you can send faxes via email or your PC from any application. Prices start at \$7.99/month for 500 pages and go up from there.

One shared fax number for your company
Share your fax number between multiple employees

Dedicated fax number
for each employee

MOST POPULAR	CORPORATE PLAN
<p>Fax 500</p> <p>500 FREE Pages included monthly**</p> <p>\$7.99 / MONTH*</p> <p>FREE TRIAL</p> <p>BUY NOW</p> <p>5.9c for additional pages** Includes All Features</p>	<p>Fax 1000</p> <p>1000 FREE Pages included monthly**</p> <p>\$19.99 / MONTH*</p> <p>FREE TRIAL</p> <p>BUY NOW</p> <p>4.9c for additional pages** Includes All Features</p>
<p>Fax 2500</p> <p>2500 FREE Pages included monthly**</p> <p>\$49.99 / MONTH*</p> <p>FREE TRIAL</p> <p>BUY NOW</p> <p>3.9c for additional pages** Includes All Features</p>	<p>Fax ProUnlimited</p> <p>Unlimited Pages** included monthly†</p> <p>\$39.99 / MONTH* Includes 2 fax numbers Add'l fax numbers \$4.99 / mo</p> <p>CONTACT SALES</p> <p>1-888-389-0854</p>

Fax features:

- Toll free or local number
- Receive faxes on your PC, via email, or with our mobile application
- Send faxes by email
- Send faxes on your PC from any application

Includes all Fax Features, plus:

- Unique fax number for each employee
- Administrator controls
- Unlimited faxing†

ii. **Myfax:** www.myfax.com - pricing shown below. Toll free number and faxes are emailed as PDFs attached to email.

BEST VALUE	MOST POPULAR	FAX MORE
Send 100, receive 200 free pages/month	Send 200, receive 200 free pages/month	Send 400, receive 400 free pages/month
\$10 PER MONTH	\$20 PER MONTH	\$40 PER MONTH
30 DAY TRIAL	BUY NOW	BUY NOW

iii. **EFax:** www.efax.com - This is a more expensive option. Pricing shown below:

eFax Plus	eFax Pro
Annual Membership ⓘ \$14.13/mo. (Save 2 months)	Annual Membership ⓘ \$16.63/mo. (Save 2 months)
Monthly \$16.95/mo.	Monthly \$19.95/mo.
Setup fee \$10.00	Setup fee \$19.95
Receiving faxes 150 FREE pages every month! Then \$0.10/pg	Receiving faxes 200 FREE pages every month! Then \$0.10/pg
Sending faxes 150 FREE pages every month! Then \$0.10/pg	Sending faxes 200 FREE pages every month! Then \$0.10/pg

I. **Instant Messaging:** Typically abbreviated as IM, this is a type of communications service that enables you to create a kind of private chat room with another individual in order to communicate in real time over the Internet. It's analogous to a telephone conversation but using text-based, not voice-based, communication. Typically, the instant messaging system alerts you whenever somebody on your private list is online. You can then initiate a chat session with that particular individual. IM systems often also include video (users can see each other via webcam), file-sharing/transfer capabilities, and phone (users can talk to each other using microphones connected to or built into their computers).

i. **Why IM Is A Valuable Communication Tool:** When you and your colleagues are spread out geographically, this can be invaluable (and it's typically free). For example, someone in one office might need a quick answer from someone in another office. It's often difficult to reach someone on the phone and email queries are easily lost among the torrent of daily incoming email that each person has to deal with. This is when instant messaging is the perfect solution. With one click, the individual who needs an answer can determine if the person they need to communicate with is online and available. If that person is available, the asking individual can pop his/her question up on the computer screen of the person who can answer it. As long as the recipient can type (even if they're on the phone), they can quickly reply without interrupting what they are already doing. No phone call or email is necessary. One of our clients who started using IM commented:

"This is also critical when working with support staff who are working through issues on a phone call with an external party. By having access to the supervising attorney in real time, issues can be resolved immediately, rather than through several follow up calls or emails as questions go back and forth. I often use a paralegal in another office for litigation support and this has assisted me in working

seamlessly with her, despite the fact that she is 45 miles away."²⁰

- ii. **Consumer-Grade IM:** Common services include AOL AIM (www.aim.com), Google Talk (www.google.com/talk), IBM Lotus Sametime (<http://tinyurl.com/62nvm2>), Microsoft's Live Messenger (<http://explore.live.com/messenger>), Skype (<http://tinyurl.com/3hbdr7y>), Yahoo! Messenger (<http://messenger.yahoo.com>), and Apple iChat (<http://tinyurl.com/3lxdld6>).
 - iii. **Secure IM Options:** Some businesses elect to deploy a secure instant messaging system. These systems are typically closed (limited to intra-company communication only), secure and can be monitored. Options include:
 - a. **Microsoft Lync:** See <http://tinyurl.com/358j58j>
 - b. **IBM Lotus Sametime:** See <http://tinyurl.com/62nvm2>
 - c. **IceWarp Instant Messaging Server:** See <http://tinyurl.com/66roosj>
 - d. **Cisco Jabber:** See <http://tinyurl.com/65wqyf5>
 - e. **Bopup Messenger from B-Labs Software:** See www.bopup.com/products/messenger
 - f. **BigAnt:** See www.bigantsoft.com
 - g. **Brosix:** See www.brosix.com
- J. **Dropbox:** Dropbox or an equivalent service (see paragraph 6.J.iv. below) allows you to have all of your stuff (files/documents) on all of your devices - wirelessly and automatically. Since people often stress about not having the information they need to get work done, this effectively eliminates the problem.
- i. **Dropbox Features:**
 - a. **File Sync:** Dropbox allows you to sync your files online and across your computers automatically. Therefore, all of the files you need can be accessible from all of the computers (Windows or Mac), tablets and phones you use.
 - (1) Work on files in your Dropbox even if you're offline. Your changes sync once your computer has an Internet connection again.

²⁰ Erin Stewart, attorney in the office for the General Counsel of the University of North Texas

- (2) Dropbox transfers correctly resume where they left off if your connection drops.
 - (3) Efficient sync: only the pieces of a file that changed (not the whole file) are synced. This saves you time.
 - (4) Doesn't hog your internet connection. You can manually set bandwidth limits.
- b. **File Sharing:** Sharing files is simple and done in only a few clicks.
- (1) See other people's changes instantly.
 - (2) A Public folder that lets you link directly to files in your Dropbox.
 - (3) Control who is able to access shared folders. Kick people out and remove the shared folders from their computers.
 - (4) Automatically create shareable online photo galleries out of regular folders.
- c. **Online Backup:** Dropbox backs up your files online without you having to think about it.
- (1) Automatic backup of your files.
 - (2) Undelete files and folders.
 - (3) Restore previous versions of your files.
 - (4) 30 days of undo history. Upgrades available for unlimited undo.
- d. **Web Access:** A copy of your files are stored on Dropbox's secure servers. This lets you access them from any computer or mobile device.
- (1) Manipulate files as you would on your desktop. Add, edit, delete, rename, etc.
 - (2) A Recent Events feed that shows you a summary of activity in your Dropbox.
- e. **Security & Privacy:** Dropbox takes the security and privacy of your files very seriously.
- (1) Shared folders are viewable only by people you invite.

- (2) All transmission of file data and metadata occurs over an encrypted channel (SSL).
 - (3) All files stored on Dropbox servers are encrypted (AES-256).
 - (4) Dropbox website and client software have been hardened against attacks from hackers.
 - (5) Dropbox employees are not able to view any user's files.
 - (6) Online access to your files requires your username and password.
 - (7) Public files are only viewable by people who have a link to the file(s). Public folders are not browsable or searchable.
- f. **Mobile Device Access:** The free application for iPhone, iPad, BlackBerry and Android lets you:
- (1) View files from within the application.
 - (2) Download files for offline viewing.
 - (3) Take photos and videos and sync them to your Dropbox.
 - (4) Share links to files in your Dropbox.
 - (5) Export your files to other applications.
 - (6) Sync downloaded files so they're up-to-date.
- ii. **Pricing:**
- a. **Dropbox Basic:** 2 GB of space for free
 - b. **Dropbox Pro:** 1 TB of storage, password protected shared links, remote wipe, version history for \$99/year
 - c. **Dropbox Business:** Individual box for each member on your team, unlimited space, unlimited file recovery and versioning, centralized billing, admin controls, minimum of 5 users for \$750/year (for all 5 users).
- iii. **Need Encryption?** Check out:
- a. <https://www.boxcryptor.com/en>
 - b. <https://www.viivo.com/>
 - c. <https://www.sookasa.com/>

iv. **Alternatives to Dropbox:**

- a. **SpiderOak:** See www.spideroak.com - similar service to DropBox except that it is more secure because your data is encrypted even on SpiderOak's servers.
- b. **Microsoft OneDrive:** <https://onedrive.live.com/about/en-us/>.
- c. **Syncplicity:** See www.syncplicity.com.
- d. **Box.com:** www.box.com
- e. **Sugar Sync:** See www.sugarsync.com. This service offers online backup of your files and file synchronization among multiple PCs and smartphones. You can access your files anywhere you have Internet access thanks to apps for BlackBerry, iPhone and Windows Mobile.

K. **ShareFile by Citrix:** www.sharefile.com - This is a fantastic service that allows you to create virtual "rooms" for others and share documents with them securely. You decide what rights each user has to the collection of documents. Simple and powerful.

Personal	Team	OUR MOST POPULAR PLAN Business	Virtual Data Room
All the essential tools to get your small shop started.	Full file-sharing functionality and storage for your growing business.	Comprehensive file-sharing for highly collaborative teams.	Advanced security, sharing and control for sensitive data.
\$16/ Per month billed annually*	\$60/ Per month billed annually*	\$100/ Per month billed annually*	\$295/ Per month billed annually*
Buy It Now	Buy It Now	Buy It Now	Buy It Now
Or Start Free Trial	Or Start Free Trial	or Start Free Trial	or Start Free Trial
1 Employee Account	5 Employee Accounts (\$8 per additional account)	5 Employee Accounts (\$10 per additional account)	Call us at 1 888 260 6550 or Learn More and start a free trial
100GB/ 10GB	1 TB/ 10GB	Unlimited/ 100GB	5GB/ 10GB

L. **Search Software:** For many lawyers, this is the most valuable software utility they use. Fortunately, there are multiple options and most of them are inexpensive or free.

- i. **Search Software Defined:** Lawyers tend to create new documents from existing documents. To the extent they can't find the correct starting point document, the process is compromised or delayed. Further, as more and more lawyers begin scanning documents, the ability to find specific

electronic documents quickly becomes even more important. Briefly, search programs read through all of the word processor or scanned documents you've got, and they build an index of the text contained therein. Once the index is built, you can search through all of those documents by either file-name OR the words contained inside them. When searching for words contained inside the documents, you can use the standard Boolean logic (and, or, not, etc.).

- ii. **Search Program Options:** Even if you've created a good file naming convention, you'll still need help finding some documents. Now that you've created searchable PDFs, you can search through all of them at once, quickly, by searching for particular words. Here is a survey of your options:
 - a. **Copernic Desktop Search:** RECOMMENDED - See www.copernic.com. There are three versions of Copernic, Home (FREE), Professional (\$49.95) and Corporate (\$59.95). Unless you're installing it in a very large firm, you only need the **Professional version**. You can try the free home version, but one of the limitations of the free version is that it does not search network drives. So unless you're keeping all of your files on the C:\ of the computer you're using (I certainly hope you're not doing this), the Home version will not help you very much. Copernic will search all of your files (Word, Excel, PowerPoint, PDF, HTML, WordPerfect, text and another 150 types of files). It will also search Outlook or Outlook Express email and any attachments to email.
 - b. **dtSearch:** RECOMMENDED: See www.dtSearch.com - \$199 - one of the most sophisticated and fast search engines I've ever seen. It provides the most search options and file types that it can recognize. If you need industrial strength search capability involving enormous numbers of documents, this is your program.
 - c. **Filehand:** See www.filehand.com - FREE. Instantly search for files on your computer, by content. See the extracts of the files you found, even for PDF files. Scroll through the extracts so you can quickly find the information you're looking for. Find the file you are looking for, even when many files match, because Filehand Search sorts the results by relevance. Do complex Boolean searches and searches by phrase. Use it all the time because it is so simple to use!
 - d. **Instant Search (Windows Vista and Windows 7):** For more information on this, see <http://tinyurl.com/6j584x>. This is included with all versions of Vista.
 - e. **Spotlight Search (Mac):** This is included with the Mac OS X operating system. For more information, see <http://support.apple.com/kb/HT2531>.

- f. **EasyFind (Mac):** Free - see <http://tinyurl.com/d6se856>
 - g. **HoudahSpot (Mac):** RECOMMENDED - \$15 - see www.houdah.com/houdahSpot
- M. **Fujitsu ScanSnap iX500 Sheet-Fed Scanner:** Want to start reducing paper in your office and get digitally organized? In our professional opinion, this is the best possible device to help you get started.
- i. **ScanSnap Description:** It's sheet-fed (feeder holds 50 pages at a time), scans 25 ppm simplex (single sided), 50 ppm duplex (double-sided), comes with Adobe Acrobat X Standard (Windows version), business card scanning software and software that will convert hard copies to editable Word documents in seconds. It will scan anything from a business card up to 8.5" x 14" paper. The US mnfg. part number is PA03656-B005 and it costs \$429 from www.amazon.com. This scanner is both Windows and Mac compatible.
 - ii. **Other Features:**
 - a. **Wireless Capability:** The iX500 has wireless connectivity and a new (free) app which allows you to scan a PDF or JPG file directly to your iOS or Android phone or tablet.
 - b. **Intelligence:** The iX500 auto-senses paper size, color/black & white, automatically deletes blank pages and will auto-rotate documents which are inadvertently scanned upside down.
 - c. **Better Quality:** The scanner has a "GI" processor built-in which performs "intelligent image enhancement." So the images will look better than they did with the predecessor model (ScanSnap S1500) and related to this, they have increased the speed with which the scanner creates searchable PDFs.
- N. **Dragon NaturallySpeaking:** Dragon NaturallySpeaking (DNS) - Dragon NaturallySpeaking is available from Nuance. There are five different versions: Home, Premium, Professional, Legal, and Medical. If you dictate a lot of statutory and case citations, then you should consider Dragon Legal Individual v15 (\$500). If you don't dictate a lot of citations, then consider Dragon Professional Individual v15 (\$300). Both options are incredibly accurate and take very little time to train (30 minutes max.).
- O. **Case Management Software:**
- i. **What Case Management Programs ("CMPs") Can Do For You:** Case management programs (aka practice management programs) will handle your calendar, contacts, matters, time-entries, phone messages, etc. It organizes your life, it "thinks" like a lawyer and it can play a key role in

organizing your office and allowing you to easily share information with others in your office.

ii. **What Case Management Software Helps You Do:**

- a. **Manage Your Matters/Cases:** The most important element of a CMP is file/case/matter management. It is the central feature that all programs like Outlook, Google Apps, ACT! & Goldmine are missing. Your law practice revolves around the matters you're working on. The information you have on all your matters is seemingly endless. Being able to access all of the information you have about your cases (who is involved, events, tasks, communication, time entries, etc.) immediately is incredibly valuable to your practice. This same information is also available to everyone in your firm who works on that file. No matter how much you customize programs like Outlook, you will not get matter management.
- b. **Manage Your Contacts:** You need good communication not only with your clients, but with everyone in your office(s) and anyone else involved in the matters/cases you're handling. It is important that information relating to the people in your contact database is consistent, kept up to date, and complete. By training the staff to properly input contact information, you will be able to fax, e-mail, call or communicate in writing with a contact with a minimal amount of effort.
- c. **Manage Your Calendar:** In the legal world, calendars change all the time. You need a way to manage your calendar, and to manage your calendar as it relates to others in your firm. You need to be able to see calendars with any variation of people and resources, in a day, week or month view, including whatever events you want to see. It is important that the calendar is easily changeable, easy to read and that it is easy to find times when you and others in your firm are available. You also need the ability to schedule a resource (conference room, library, firm projector, etc.) without having to speak to the receptionist who holds the appointment book for the resource.
- d. **Manage your Tasks:** Your day is about prioritizing the endless list of things that need to be done, both for your clients and for your firm. Deadlines are critical, and your case management software should be able to manage a task from the time it is put on the list, until it is completed and filed away with the matter it relates to. Often times, your tasks are linked to other tasks. One thing cannot be done until another thing happens. Your case management software needs to be able to link events easily.

- e. **Manage Your Time Entries:** It MUST be as easy as it can possibly be to bill for your time. You need to be able to track and manage your time, by seeing how much time you have accumulated for the month, see how much time has been sent to your billing package and see your time sorted by matter. The majority of your billable time comes from appointments, tasks, phone calls and e-mails. A good case management software should help you capture otherwise lost billable time.
 - f. **Manage Your Communications:** Phone calls, phone messages and e-mails are a regular part of your life. Effectively managing them is often the most important thing you can do to maintain your sanity and render good customer service. Your case management software should allow you easily record and bill for your communications. Mastering the management of your communication will pay for your case management software and implementation over and over again.
 - g. **Assemble Documents Quickly:** Creating a document in a law office is often far more time-consuming and annoying than it should be. It usually involves the preparer racking their brain to try and remember the last person/client for whom they created a similar document. If the document can't be found, then it must be reinvented even though it already exists somewhere in the system. Managing the preparation of your documents is a critical time saving feature of case management software. Taking on the project of organizing your most frequently used documents into a template structure, and then creating those documents from within your case management allows you to be sure there is consistency in the documents created in your firm, and since the case information is extracted from your case management software, there is less chance for errors in the document.
 - h. **Manage your Research:** Accessing your research provider easily and compiling your firm research into a central location so others in your firm can have access to the information you have already discovered, will save time and money on legal research. You will also eliminate the need for others to find the same information that has already been catalogued for the firm. The different software programs approach research organization differently.
- iii. **Case Management Main Players:** There are many more than this, but here are some leading candidates:
- a. **Purchased Options:** Here are some "shrink-wrapped" options:
 - (1) **AbacusLaw:** Abacus Data Systems, Inc. - 800.726.3339; www.abacuslaw.com

- (2) **Client Profiles:** Client Profiles, Inc. - 866.720.5005; www.clientprofiles.com
- (3) **LawBase:** Synaptec Software, Inc. - 800.569.3377; www.lawbase.com
- (4) **Practice Master:** Software Technology, Inc. - 402.423.1440; www.stilegal.com
- (5) **ProLaw Ready:** Thompson/West - 800.977.6529; www.prolaw.com
- (6) **TimeMatters:** LexisNexis - 800.328.2898; www.timematters.com

b. **Cloud (Subscription) Options:**

- (1) **ActionStep:** www.actionstep.com
- (2) **AdvologixPM:** www.advologix.com
- (3) **Amicus Attorney Cloud Edition:** www.amicus-cloud.com
- (4) **Clio:** www.goclio.com
- (5) **MyCase:** www.mycase.com
- (6) **Houdini Esq:** http://houdiniesq.com/esq.html
- (7) **Rocket Matter:** www.rocketmatter.com

P. **Document Management Systems:** Document management systems (DMS) are simply hardware/software systems that automate the document management process (creating, saving, finding documents & email). Specifically, a DMS provides an organization with the tools to create, manage, control, and distribute electronic documents. Stated more succinctly, a DMS is the ultimate electronic filing system which will allow you to easily create complete parallel electronic files. You can find anything at any time and get everyone in your office on the same page. If something like this is financially out of reach now, keep it in mind as your office grows. It's one of the few technologies that change everything and can really impact your efficiency in a positive way. There is simply no better way to manage client files.

i. **Features of a DMS:** A DMS does much more than a plain search program. For example:

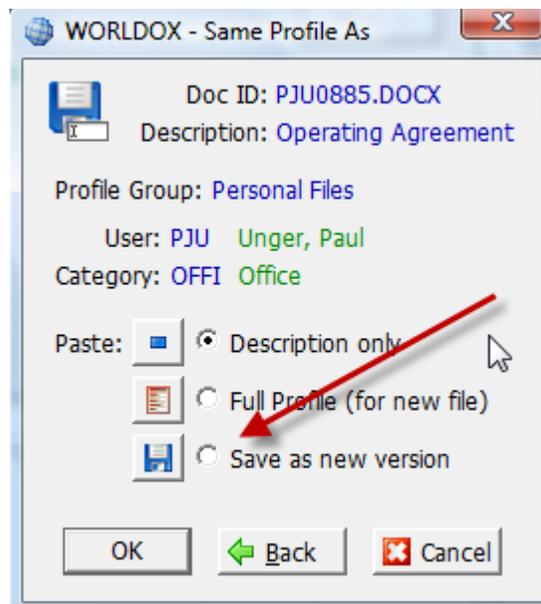
a. **Full Text Indexing/Retrieval:** A true DMS provides several avenues for users to find documents. One option is to search for words contained inside the file. This is the ONLY function offered

by search programs. As you will read below, a DMS does a lot more than that.

- b. **Forced User Compliance:** This is possibly the most important part of a DMS. It means that your DMS takes over all Open, Save and Save As commands in any application the user uses. This ensures that all documents will be saved within the DMS, and will be available for searching. This feature eliminates the possibility of users saving critical firm documents on their local hard drives, or saving them in a private directory where others cannot retrieve the document. By contrast, a plain search utility cannot force users to do anything a particular way.

- c. **Document Versioning:** A document version is draft of a document saved as a subsequent revision of a prior draft. By creating discrete versions of a document, it is possible to retrace its evolution. Document versions generally run linearly, such that version 2 follows version 1, version 3 follows version 2, and so on. Some document managers enable users to create branches, or sub-versions. When using sub-versions, version 1 (called a major version) may be followed by version 1.1 (a minor version), then by version 1.2, and at some point a new major version, version 2, is created. A DMS that supports version control must allow users to spawn new versions, within accepted guidelines, to return to prior versions, and to offer tools to work with versioned documents, such as redline comparisons.

When versioning is turned on, the user can be prompted to save the document as a new version, or it can be a mandatory setting. Here is an example of the dialog box.



- d. **Document Security:** Document security places the DMS at the focal point of access and permission to the document repository. Document security involves documents, users, and groups of users. The DMS assigns rights and permissions to documents based on individual users, groups of users, and the roles in which users serve within the organization. For example, documents saved in the administrative profile group would likely not be available to all users. Those documents can be secured by user, user group or by role. You would also have the ability to secure an individual document that otherwise would be available to everyone.

On the same subject, the history of a document is crucial. Most DMSs will save a history of each and every document created, with administrative reports available to track a document from beginning to end. Those type reports describe each action in the life of a document including who performed the action, its date and time, and the nature of the action itself.

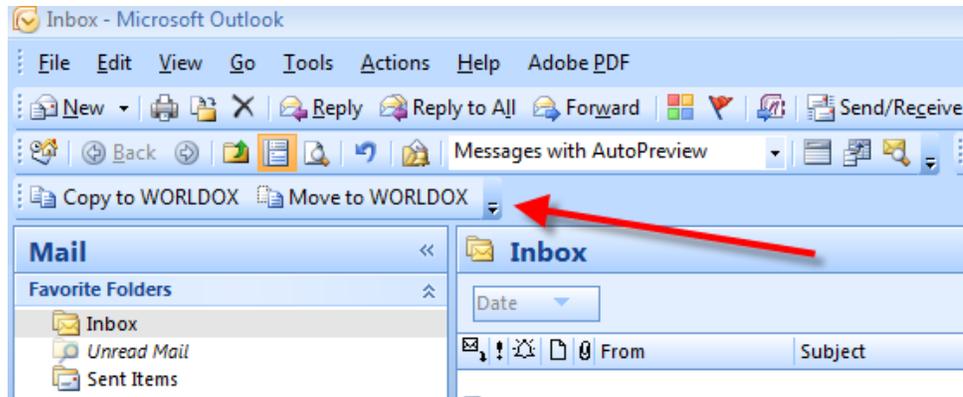
- e. **Remote Web Access/Offline Access/Mobile Phone:** Your DMS should have the ability to mirror documents locally, in the event of a network failure. When the connection to the network is restored, any changes should be seamlessly re-synchronized to their network counterparts.

Most DMSs also have an internet component which allows internal users the ability to access any documents in the DMS from a remote location, with the same security in place as if they were accessing the documents locally. Additionally, security can be set so the DMS can act as a portal for a law firm's clients to access documents specifically related to their case.

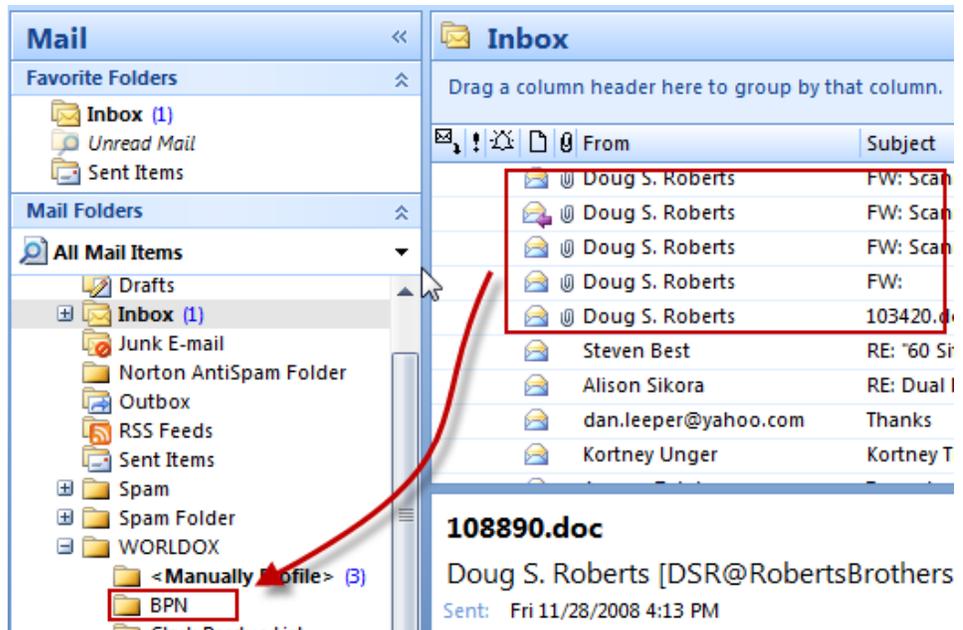
- f. **Android/iPhone/SmartPhone Integration:** For the times when you are on the road with no access to a PC, you can also access your documents via your mobile phone.

- g. **Email Integration:** The ability to share your client related emails with others in the firm is on the to-do list of many firms. With a DMS, all client related emails can be easily saved along with the other client related documents. They are also text searchable for easy retrieval.

The ability to save email is extremely important in light of the number of client-related emails we receive in our inbox on a daily basis. With a DMS, a new toolbar is typically added to Outlook which makes email very easy to save into the system. Here is an example of how this looks in a DMS:



You can also drag and drop email on to shortcut folders that will automatically save the email:



h. Additional Important Features of a DMS:

- (1) **Document Viewers:** An enterprise-level document management system is called upon to manage more than one type of file. In a typical installation, the DMS is managing word processing files (often generated by more than one word processing program) spreadsheets, data tables, image files of various formats, project files, HTML files, and so on. As these files, or objects, are under the control of the DMS, it must provide a means to view these files. The file viewers are integrated into the program such that text "hits" found during searches are highlighted in the viewers. It is certainly easier than opening each item until you find the one you want.

- (2) **Archiving:** Archiving is a means to move dated or unused files off the main storage medium to secondary storage. The DMS must ensure that users can still search for information in the archived files and, if desired information is contained in an archive, that there is a ready means to restore it. Many document managers will allow site administrators to set "triggers" in the document profiles that enable automated archiving. For example, it may be desirable to set internal memos to be archived automatically after say, 90 days.
 - (3) **Quick Retrieval Methods:** Being able to save common searches, and easily access your recent searches is very helpful. Most systems will allow you to quickly access your last searches as well as the last documents you have created/edited.
 - (4) **Easy Administrative Tools:** A DMS administrator should be able to easily make changes to large groups of documents, as well as easy access to common tasks such as adding new users, setting up security and refining profile group tables.
 - (5) **Access Control:** As networks have become commonplace, so too has collaborative authoring and editing of documents. A document management system must provide some way for multiple authors to coordinate activities across one or more documents. One of the primary means for doing so is to implement a document check-in/check-out regimen. When a user checks out a document, he or she has the option of "locking" it so that other users can view the document, but cannot make any changes to it. This prevents problems that may arise when several workers attempt to edit the same document at the same time. With check-out, only one worker may edit a file. When finished, the worker checks the document back in through the DMS, making it available to other users once again.
- ii. **Document Management Main Players:** I've listed below the main players in the legal market, but there are many other options.
- a. **Worldox:** See www.worldox.com. Worldox is easily the most popular option for solos, small and mid-sized firms.
 - b. **iManage (formerly Interwoven) WorkSite:** See <http://www.interwoven.com>. This options is more expensive and tends to dominate in larger firms.

- c. **NetDocuments:** See www.netdocuments.com. This is strictly a cloud based option and is therefore going to be less expensive up front than the aforementioned options.
- d. **Document Management Built Into Case Management:** Every case management program (both shrink-wrapped software and cloud based options) listed in paragraph 6.O. above contains document management functionality, some more sophisticated than others. Time Matters, for example, has pretty sophisticated document management ability.