



# The Legal Connection

where legal technology & people connect

2012-03/04



## TechShow is here! TechShow is here!

Long time readers will know just how excited I get for ABA TechShow in Chicago each year. This legal trade show is without a doubt my favorite business trade show/networking event. In fact, I love TechShow so much – I endure flying and the stress it puts on my nervous system! For me, TechShow has always been about the people – and this year was no different!

I flew into Chicago a day early to assist Matt Homann with LexThink.1 – formerly IgniteLaw. This was the third year I worked this event and I think it was the best year yet. Ultimately, 11 speakers each got 20 slides and exactly 6 minutes to cover this year's topic: 21<sup>st</sup> Century Client Service.

I love LexThink.1 - the presentations and the fast paced, yet casual atmosphere are awesome. More than 300 people registered to be part and from where I was monitoring at the back the room, there wasn't an empty seat in the house!

Mark Britton started the line up – and incredibly, spoke his last syllable as the slide behind him went dark -talk about nailing the timing. The ToastMaster in me was impressed.

Ultimately, the fan favorites were Will Hornsby's witty ethics presentation; with perennial fan favorite Jay Shep and first time presenters Jim Ring and Steven J. Best as runner's up. Watch all the videos at <http://www.pointonlaw.com/videos>

After LexThink.1 – a small group and I headed to The South Loop Club as I could not wait to get my hands on a yummy burger and an ice cold beer! Last year, Clio sponsored a LegalTypist tweet up at South Loop and this year, NetDocuments graciously stepped up to sponsor what became a late night happy hour for attendees and speakers of LexThink.1 Shout out to the Canadian Contingent!

The next 3 days were a whirlwind of educational sessions; expo floor connections and yummy dinners hosted by TechShow Board members at some of Chicago's best restaurants. #baconwrappeddates <-I'm slobbering just typing that!

But don't take my word for it! The beauty of twitter is the ability to capture the moment for lots of different people at once! TechShow was no different and used the hashtag #ABATECHSHOW which I compiled into downloadable pdf reports you can grab on the next page and browse at your leisure!

TechShow 2013 is scheduled for April 4-6, 2013 and I can only imagine LexThink.1 will be held April 3<sup>rd</sup> - so mark your calendar now to be there and make sure to send an email to techshow @legaltypist.com if you want to get in on any deals I put together.

til next month...

# Twitter Reports – ABA TechShow 2012

## ABA TechShow Eve

#ABATECSHOW  
Tweets from Eve of #ABATECSHOW  
Wednesday, March 28, 2012

Compiled by:  
Legal Typist

Participants

<http://ow.ly/apgRG>

## Day 1

ABATECSHOW 2012 - Day 1  
500 tweets from #ABATECSHOW 2012  
Thursday, March 29, 2012 - Day 1

Compiled by:  
Legal Typist

Participants

<http://ow.ly/aphKB>

## Day 2

ABATECSHOW 2012 - Day 2  
500 tweets from #ABATECSHOW 2012  
Friday, March 30, 2012 - Day 2

Compiled by:  
Legal Typist

Participants

<http://ow.ly/apnZf>

## Day 3

ABATECSHOW 2012 - Day 3  
500 tweets from #ABATECSHOW 2012  
Saturday, March 31, 2012 - Day 3

Compiled by:  
Legal Typist

Participants

<http://ow.ly/apjcv>



# Clear the decks for a shiny new quarter!

First quarter's nearly over; time to clean up your pipeline. How are you going to know where you are versus your goals if you don't get real about your results at the end of the quarter? Here are some loose ends to address before they unravel further:

**1. Work you "sold" but never closed.** You never really know why, but there will always be prospects who assure you they will work with you, but they never actually sign an agreement, send documents back or give you a retainer. You're sure they're going to come in, you keep rolling the income projection forward, but they never do. Take them out of your pipeline. Put them back in the prospect pool for routine follow up. If you haven't done a last-ditch solicitation, you can do that, but don't waste a lot of time here. I'm not saying they won't ever close, I'm just saying you need to put them back into prospect status and monitor how much you invest in them. Who knows, perhaps you're missing five new clients while you're spending time tracking these folks down.

**2. Accounts receivable.** Make sure that you have written off everything per your policy. (You do have a policy on aged accounts receivable, right?) If you need to declare an amount uncollectable, do it, clean it up, and don't let it happen again. Weigh the cost of collections versus the size of the fee as you decide how much resource you'll use trying to collect. Meanwhile, that's income that you should not accrue or count on.

**3. Work-in-process billing.** If your resolution to keep records up to date and billings current fell through when your quarter picked up- catch up now. Make sure that all of the work in process is reflected in your billing systems and get clients' bills out timely. Billing is a client service issue, you know. Your clients want their books to be clean and current by quarter end, just as you do. Don't make them wait!

**4. Work you're sitting on.** Nope. You aren't the only one who does this. Even lawyers who need the cash flow sometimes sit on work that they might start. It really doesn't matter why you might be dragging your feet- just use this opportunity to take action on all the work you have been retained to do. Start by bringing your casework up to date, and continue by putting relevant internal deadlines on your schedule so that you are motivated to complete work going forward.

**5. Contacts you've been avoiding.** Stop and think, who came to mind right then? There's always someone. Whether it's someone in your professional life or your personal life- make a list and be in touch. If you don't, it will become more and more difficult. Of course, you can also decide to stay out of touch with that person you've been avoiding. Just make the decision and stop feeling guilty about it!

If you do these five things, now and routinely- you'll be more successful and less stressed in 2012. Why wouldn't you?



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**Barbara Nelson** helps lawyers and other professionals learn the simplicity of action. She's grateful for the opportunity to show up here and share her unique perspective. Barbara is a huge fan of writing to improve productivity. To learn more, visit Barbara's blog: <http://www.successfullysolo.com/blog>





## 3 Old School Ways Your Receptionist Can Save You Time

We're always looking for more time. Thankfully, technology can help us save time and get more done! New apps and software are developed every day, but sometimes tweaking the way you use your existing technology can make a huge difference. Take the telephone. If you have an in-house receptionist or a virtual receptionist service answer your calls, you can set up some guidelines to make the most of your time.

Answer calls during a set time. Sometimes called time-blocking or task-blocking, set aside a few hours every day where you can be available to take calls. A phone call can interrupt your workflow, and once you hang up, it can be hard to get back into the mindset of your project. Setting aside a few hours in the morning or afternoon can help you keep focused. Either set up a daily time where you're available, or let your receptionist know when you'd prefer not to be disturbed; your virtual receptionist service may even have an iPhone app so that you can update your status on the fly!

Make return calls at predetermined times. For those times when you're unavailable, have your receptionist relay to callers that you typically return calls at a specific time of day. Virtual receptionist services can sometimes add this to your instructions as well. For example, have them say that you typically return calls from 2:00-4:00 and ask if there's a good time to speak. Your clients will have great expectations, and you'll be more likely to connect with them!

Have your receptionist perform different tasks based on the type of call. Both in-house receptionists and virtual receptionist services can customize your call handling, and this can be a real time-saver. For example, if the caller is a new client, you may want to have whomever answers your phone perform an initial intake and send you an email with the information. You can have them do this before they transfer you the call (so that you don't have to spend time collecting that info yourself), or you can have them send it to you in an email. Your new client will feel like they've engaged with your firm a bit, and you'll be fully prepared for a return call.

On the other hand, judges and people from the court could trump all of your other instructions; just because you're unavailable for callers with routine questions, doesn't mean you want to wait to call back a judge with an urgent update about a big case. Have your (virtual) receptionist take messages for all your calls, except people from the court and urgent calls, and you'll have the peace of mind that you won't be missing anything while you're getting stuff done.

Scheduling your time can ensure you make the most of it; make sure your receptionist or answering service is doing all they can to help!

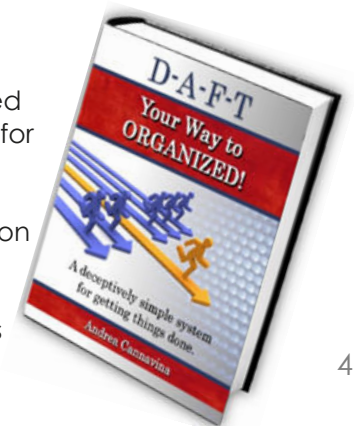


**Katie Wilson** is a Sales and Marketing Associate at Ruby Receptionists. Harkening back to an era when every call to an office was answered by a friendly receptionist, Ruby Receptionists provides personalized live, virtual receptionist service to small businesses and professionals throughout North America. Visit: <http://www.callruby.com> to learn more.

**D-A-F-T Your Way To Organized!** is my own personal organizational system. I had hoped to find/buy a system I could use – only to find that the systems out there were created for those who authored them and did not fit my personal style of organization.

**D-A-F-T** is a combination of the systems I learned; with a lot of practical consideration on just how things in law offices really get done.

**D-A-F-T** works for me and I know it can work for you too! Give it a try – it's free and less than 20 pages! Grab a copy here: [www.legaltypist.com/D-A-F-T](http://www.legaltypist.com/D-A-F-T)





## The Rural Lawyer Take on Clean Tech

It's in the homes of spiteful old widows that one finds such cleanliness. -- Fyodor Dostoevsky

I cannot, by any stretch of imagination, be confused with a clean-freak. My private office is kept in a state of carefully managed chaos, occasionally disrupted by a biannual reorganization of the piles, the odd vacuuming, or an irregular exposure to a dust cloth, isolated from the ravages of the cleaning crew that patrols the public spaces of my office keeping them to the impeccable standards of the attorney I share space with.

Even the physical manifestations of my digital world embody this laissez-faire approach to neatness - cables run freely along baseboards, bursting from their cable ties to add a bit of kinetic color to the drab, industrial black demarcation of the boundary between wall and floor. Printers, routers, disks and CPUs are scattered between bookshelves, desktops, and tabletops; often sitting cheek by jowl with books, orchids, and the occasional stuffed frog - location being determined more by the availability of an electrical outlet than any cohesive plan - it's feng shui colliding with Thomas Edison.

But cross the digital divide, and it is a far different story. My digital desktop is a stark expanse of lovely, precise (almost compulsive) order. A few files (my most immediate matters) sit with military precision along the periphery of my monitor, leaving vast expanses of uncluttered pixels to be managed by virtual desktops - one to a file, each corraling the applications needed for that matter.

This obsessive drive for digital neatness extends far beyond a simple scheme for matter management, as digital housekeeping and garbage collection is performed with far more regularity than its physical counterpart, as automated scripts regularly sweep my disks for the digital detritus left when files are deleted, consigning it to digital purgatory with multiple overwrites while other members of my digital cleaning crew defragment my disks and picking up after my forays across the web.

Now, this maniacal compulsion to keep my digital world is not without rewards; disk access is faster, data destruction is assured, browsers run faster, privacy is improved, and it is easier to find stuff. Yet, this obsession for digital order, this drive for a white-glove clean electronic office is not fueled by rewards. It is the remaining remnant of an early exposure to Fortran - that punch card based, fixed column, 32 statement rite of passage for scientific programmers of a certain age. Fortran was a language intolerant of free expression and abstract form; programming in it was as much about rigid adherence to layout as it was about syntax.

Since those early days, I have been introduced to modern programming languages, those bohemian object oriented tarts with their free formatting and loose line lengths, but cannot break free from the comfort of a neatly tabbed page of code - it's that darn primacy biting me in the ass - and that comfort, that sense of "rightness", has leaked from those old pages of code; infecting my digital environs with an unwholesome cleanliness usually reserved for Russian novels..



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**Bruce M. Cameron** Having decided that going to law school and opening a solo law practice would be a sufficient response to the male midlife crisis, Bruce now practices Collaborative Family Law and Estate Planning in rural Minnesota. When not in the law office, he can be found on his small farm where he and his wife are at the beck and call of a herd of horses, a couple of cats, a few dogs and one extremely spoiled parrot. <http://www.rurallawyer.com>



# Clean Up Your Email Inbox

Is your email inbox impossible to keep up with? Do you waste time looking for important client emails by searching your inbox? Do you use your email inbox as a place to archive information for reference? Do you keep messages in your inbox as a reminder that you need to do something? If you answered 'yes' to any of these questions, it's time to clean out that inbox and get control! Here are 5 tips that can help:

## 1. Set up Rules and Folders

By default, all of your email is routed to your inbox, which means that inbox fills up fast! It can be hard to keep track when everything is jumbled into one 'pile' in the inbox. Instead, create rules and folders to route email automatically; create folders for clients or matters and let your email program do the hard work of moving the messages for you. When you have a new message in a client or matter folder, you can see it right away and give it the attention it deserves. Since those client messages all already together and in one place, it's also easier to archive them once you've acted on them. (See #3)

## 2. Purge

For me, a lot of the clutter in my inbox comes from 'time sensitive' messages that do not relate to a specific client or matter. These can be offers from various vendors I do business with, notices about upcoming webinars or CLE programs, etc. Sometimes I flag them because I'm not sure I'm going to get around to it, but once the time has passed, the message isn't worth anything anymore. Periodically, sort your messages by sender or subject, and batch-delete them.

## 3. Archive/File

I recommend moving emails related to a client or matter into the client's electronic file folder or attaching them to the client's matter (depending on how you are running your practice and whether you are using practice management software) once you have taken action or responded. It makes sense to keep track of email correspondence in the same place you track other client correspondence. Messages that don't relate to a client or matter, aren't time sensitive and aren't junk (ex: newsletters with articles of interest, ideas for future articles and blog posts, etc.) can be moved out of the inbox to their own 'reference' folder or – better yet - to Evernote.

The advantage to using Evernote is twofold: first, it reduces the clutter in my in-box and second, in Evernote, I can tag the item with multiple tags so when I'm looking for information on a particular topic or searching for blog post ideas, I can find them much more easily.

## 4. Unsubscribe

If you're like me, you get all kinds of email that you never wanted in the first place: you handed out your business card at a networking function and someone thought that gave them permission to put you on their email newsletter list; or you bought something one time and now you get 10 emails a week with offers from that store or vendor. Don't just do the sort and purge (see step 2) – go the extra mile and click the unsubscribe button at the bottom of those emails to get rid of them once and for all! You can re-evaluate the newsletters and other email you receive periodically, too. Just because the information may have been interesting and relevant to you once doesn't mean it will be forever.

If you use Gmail, Yahoo or AOL for your email, you might want to check out unroll.me, which helps you unsubscribe from newsletters and subscription lists by crawling your email and giving you a list of all of them in one place, allowing you to choose which ones to unsubscribe from. It's still in beta and I haven't tried it, but you might want to check it out.

## 5. Use your calendar and tasks

If an email relates to a specific event or date, instead of keeping track of it in your email inbox, move it to your Calendar or tasks list. If you use MS Outlook (as many lawyers do), it's easy to do– just highlight the message and drag and drop it to the calendar. This will open a calendar entry and you can enter the date information, reminders, etc. The process is similar for Tasks.

I hope this helps you to Spring Clean your email inbox – happy purging!?



**Allison C. Shields, Esq.**, President of Legal Ease Consulting, Inc., helps lawyers avoid lawyer meltdown and create productive, profitable and enjoyable law practices by improving their productivity, procedures, and business development and marketing strategy.



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creative media  
cutting edge websites for attorneys

**LEGAL** *ease*  
CONSULTING INC

# LET'S CONNECT!



THE LEGAL CONNECTION HAS A LINKEDIN GROUP

Join our group and connect with other legal professionals interested in technology, networking and sharing of practical information.

[www.tinyurl.com/TLCxnGroup](http://www.tinyurl.com/TLCxnGroup)



## The Legal Connection

where legal technology & people connect

## Calendar

Apr-May 2012

<b>Thu Apr 26</b>	1:00pm – 2:00pm	⊕ <a href="#">Online Reputation Management for Lawyers</a> - Webinar - Awo
<b>Fri Apr 27</b>	11:00am – 12:00pm	⊕ <a href="#">#legalchat</a> - twitter ☐
<b>Wed May 2</b>	1:00pm – 1:30pm	⊕ <a href="#">DAFT Your Way To Organized</a> - Webinar ☐
<b>Fri May 4</b>	11:00am – 12:00pm	⊕ <a href="#">#legalchat</a> - twitter ☐
<b>Fri May 11</b>	11:00am – 12:00pm	⊕ <a href="#">#legalchat</a> - twitter ☐
<b>Fri May 18</b>	11:00am – 12:00pm	⊕ <a href="#">#legalchat</a> - twitter ☐
<b>Fri May 25</b>	11:00am – 12:00pm	⊕ <a href="#">#legalchat</a> - twitter ☐
<b>Fri Jun 1</b>	11:00am – 12:00pm	⊕ <a href="#">#legalchat</a> - twitter ☐
<b>Sat Jun 2</b>	1:00pm – 1:30pm	⊕ <a href="#">DAFT Your Way To Organized</a> - Webinar ☐
<b>Fri Jun 8</b>	11:00am – 12:00pm	⊕ <a href="#">#legalchat</a> - twitter ☐
<b>Wed Jun 13</b>	12:30pm – 2:00pm	⊕ <a href="#">Lunch at The Main Event</a> - The Main Event Plainview, NY ☐ ☐