



# The Legal Connection

where legal technology & people connect

2014-03

## March is Madness

Snow, snow go away!

What started as a positively lovely actual "real" winter to this Canadian girl – got real old once March rolled around and I see I was not alone in thinking about snow for this March issue – The Rural Lawyer - Bruce M. Cameron gives us some food for thought comparing snow, it's removal and tools to back up.

And what a busy month March is too! The end of the month not only gives us TechShow in Chicago, but we have double header webinars planned for the [Community Site](#) on the 21<sup>st</sup> - starting with Bruce M. Cameron (aka The Rural Lawyer) – and his presentation: The Bionic Law Firm – which is about using neuroscience and what we know about how the brain functions – in order to get more business and have happier clients.

After lunch, Julie Fleming, attorney and author, engages us with her presentation on Energizing the Reluctant Rainmaker. Let's face it, we ALL just want the business to appear and none of us wants to have to sell – Julie will help us better understand how to speak and think about our marketing initiatives.

Of course, both presentations (along with the January webinar on SEO for Lawyers with the ALWAYS knowledgeable Conrad Saam) will be loaded and available on demand from the Member's Only area of the [Community Site](#).

What else is going on in March?



Along with the madness there is tons of Spring Cleaning to do!

My offering to you this month are tips for getting/staying organized, along with another chance to download/view our special report: The Sorry State of Legal Practice Management Software.

Then Justin Meyer helps us work on to do lists and some of the tech to wrangle them. Followed up by Julie sharing some great tips regarding cleaning up our contact lists.

As always, listed on the last page are our recommended tech and Community partners, and the Community Calendar – which now lists any events at which our contributors will be live (and not just when I am).

...until next month!

A handwritten signature in blue ink, appearing to be the initials 'A'.

# 5 Tips: Organization

Being well organized takes time and effort. First you have to put systems in place, then you have to maintain those systems. Below are a few tips on how to start getting organized:

**1. Jot it down.** At the very moment that you remember something that needs to be done, the very best thing you can do is write it down. I used to keep notes on my desk blotter – I would get a desk sized calendar, and turn the pages backwards and use it like a huge sticky note/scratch pad under my keyboard – because you have to ...

**2. Keep it all in one place.** Once you have developed the knack of writing everything down, your next step will be to keep your writing all in one place, otherwise, you are going to spend valuable time searching for your notes. As a desk blotter is not very portable, I now use a **Moleskin** (the **Evernote** version).

**3. Record your every thought.** I call it a brain dump and it is basically everything you have to do, think you may want to do or other noteworthy item that presently ONLY resides in your head. First off, you'll be surprised when you sit down with blank paper and a pen (perhaps a tasty beverage) and literally try to get everything in your head out – the list gets pretty long but that is exactly what you want. The

reward for this effort is the ability to free your mind of all those naggy little things it should not have to waste energy keeping track of AND to organize what you have to do vs. what can wait or be delegated. Want to learn more about brain dumps? Listen to my podcast/interview with Ernie the Attorney here

**4. Use your gadgets.** Technology allows you to carry the equivalent of a computer connected to the internet on your person – in the form of smartphones and tablets. Set up and use these types of devices to get and stay organized. Along with syncing your contacts, calendar and task lists across devices, tools to consider include the camera (great for capturing a parking spot or getting new contact biz card info captured); and dictation/recording apps – for when you need to tell someone to do something or you have an amazing thought and cannot otherwise get at a keyboard.

**5. Stop accentuating the negative.** If you keep saying you are always disorganized, you will probably continue to always be disorganized. It is important to have a positive, motivated, can do attitude.

## Most Clicked On: This FREE REPORT ->

(right click to open/download your copy)



# Finding the Perfect To-do List, or Task Management Madness

**Getting Things Done**, a time-management system, has been recommended several times, in several different fora. Todoist, a task management website, has been recommended, several times, in several different fora. Remember the Milk, another task management website, has been recommended several times, in several different fora. Even I have recommended several task management programs, several times ... well you know where this line is going. I don't use any of the programs that I've recommended (Task Coach and To-Do List), although I've tried them both. I've tried Todoist, Remember the Milk, Taskworld, and others. Now, I am looking at several apps that use the Eisenhower Matrix. It's enough to drive me crazy.

So the search goes on for the perfect task management solution. After all, with so many options, there has to be one that is perfect for me, right? So how do I find it? I start trying a system (or if I'm feeling like I can spare some extra time, then maybe I try two simultaneously). I put in a few tasks; I do a little customization. But because it's just a trial, I am not really investing too much time in getting the system just the way that I like it - I try to remove the features that annoy me most, and add the ones that I find most critical. I add a few tasks to the system, but not all of the ones that I need to do. I might try to organize them beyond simple date order. But invariably, within a week, I have moved on to another system, the only remnants of my attempt to use the previous candidate being occasional (or daily) e-mails reminding me about overdue tasks that have been completed and from which I've moved on. Sometimes I log in to check them off as completed, others I just mark the e-mail as spam.

The only constant is the to-do list in my practice management software. It's not perfect, in fact it has some flaws and it lacks many of the features and customizability of stand-alone options. It's biggest advantage is that it doesn't require me to open another tab in my browser (of which I generally have far too many open at any given time) but truth be told, there are days that go by where I don't look at it at all.

So what to do? How do I find the perfect task manager? Which of the countless to-do lists should I recommend to you as the best one? Here's the let-down reveal: I have no idea. I am pretty close to giving up on the search though. The reality is that with so many options, the perfect one probably does exist (or there is a way for me to create it myself - and no, I don't mean learning to code). The issue isn't whether it's out there, it's whether I am willing to spend the time trying to find it.

In an early episode of *How I Met Your Mother*, Ted went to a computer dating service and tried to get out of it; he said that he didn't need the service. The woman in charge then breaks down the numbers - in a city of 9 million, he is looking for eight possible women. In a sea of to do list options, I am looking for one perfect one. But instead of killing myself looking for it, I am going to make do. There's such a thing as killing myself to try and find the best fit for me, but instead, what I need to use is good enough to get the job done. Otherwise, I will spend too much time on finding a task manager, and not enough on actually checking the tasks off. So that's it. I'm done looking at the options and I'm going to just jump in and start using one ... right after I try one more.



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**Justin Meyer** is an attorney in Hauppauge, New York who handles estate planning, business law, estate administration, and probate matters. He has plenty of opinions on what makes for good task management software, and plenty of other things. He can be reached via e-mail at [jmeyer@meyeresq.com](mailto:jmeyer@meyeresq.com). To learn more about his practice, go to <http://www.meyeresq.com>.



# Spring Clean Your Contact List!

5099. That's how many contacts I currently have in my database. Like many of my clients, one of my 2014 goals is to renew some lapsed connections, and the first step is deciding who to contact. But, really... 5099 contacts? That's so overwhelming that I've resisted even thinking about getting started. Until last week.

How many contacts do you have? How many are real, meaning that you could call or email them and they'd know who you are? How many have current value in your life, because they add professionally or because you have a great personal connection? How can you separate wheat from chaff, then reconnect with your contacts so that your list is accurate and vibrant? Easy answer: spring cleaning.

This month may not feel like spring yet, depending on where you live. March 20 is the first day of spring in the northern hemisphere. In Atlanta, flowers and trees are starting to bloom, and it feels like time to come out of hibernation. Spring is the perfect time to get into social circulation and build (or extend) your network...

But first comes spring cleaning your contact list, the easy way: set aside 10 minutes each day to cull and update your list. Look for these attributes:

- **Relevance to your practice.** Is this contact a former client, a potential client or referral source? Is this contact a center of influence, someone who seems to know everyone?
- **Closeness of relationship.** Did you meet once at an industry meeting, or did you serve together as associates for a few years before your contact moved in-house?
- **Recency of contact.** The stronger the underlying relationship, the more time you can allow to pass without contact and still maintain a connection.

- **Currency of information.** Update outdated contact information (delegate this task to an assistant or a freelance admin) and remove anyone for whom you can't find current information.

Based on these criteria, assign each contact a priority level of A, B, or C. The more relevant the contact to your practice, the closer the relationship, and the more recent the contact, the higher you should rank the contact's priority. Don't assign a priority based solely on your assessment of the likelihood of getting business from or through the contact—this is not a “hot leads” or “low hanging fruit” list. Your goal is to create a clean list of contacts, pruned of anyone who is no longer part of your professional life (the law school friend who left practice and now raises alpacas), so that you can make concrete plans to stay in touch with the most important connections in your network.

The primary goal of this exercise is to clean and freshen your contact list, and the secondary goal is to create a prioritized list that you can use to create a strategic system for connecting regularly with your contacts. As you clean your list, you'll catch yourself thinking that it's been too long since you've talked with certain members, that you should introduce some of your contacts to one another, or that you have information that would interest a particular contact. Note these tasks on your task list, and schedule time to follow through.

Spring cleaning your contact list is an annual task that will facilitate your relationship-building activity all year long. Get started today!



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**Julie Fleming, J.D.** is the principal of Lex Innova Consulting, which helps private practice lawyers worldwide to master the art of effective business development. A frequent speaker for law firms and bar associations, Julie spends as much time as possible in Wyoming and the rest on Twitter as @juliefleming. LexInnovaConsulting.com

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# Madness

There is a difference between what you are contractually entitled to do and what you should do. Too often “customer service” departments are unclear on this basic concept.

Last week Southwest Airlines canceled a flight on which I was booked. I received a text notification less than 24 hours before takeoff and had to call the toll-free number for information. The official reason for the cancellation was “operational need” which translates to “not enough people on the flight to make it worth our while.” My sole rebooking option was to take a flight that left at six in the morning and spend a few hours twiddling my thumbs in Chicago waiting for a connection. This information was conveyed to me by an incredibly rude agent who clearly viewed herself as doing me a favor by putting me on a far less convenient flight.

Imagine my surprise when I called the airline’s customer service department seeking redress (i.e. a refund) and got a busy signal. I hadn’t heard a busy signal in at least five years. I called back and kept getting a busy signal. It took me 23 attempts to get through (I’m nothing if not stubborn). When I inquired why, in this day and age, a call to anyone would result in busy signal, I was told “we have a high call volume.” I replied that the “high call volume” might have something to do with Southwest’s practice of canceling flights at the last minute by text or recorded phone call (requiring the customer to call in and rebook), allowing its ticket agents to treat customers rudely, offering a far less convenient itinerary without so much as an apology, and then restricting access to customer service agents using the arcane busy signal.

When you purchase a ticket on any airline you agree to a host of rules, regulations, and policies. These are contained in a contract that no one reads and they no doubt severely limit the consumer’s rights to redress (I’m assuming this to be the case . . . it’s not like I’ve read the agreement). No doubt somewhere in that mass of verbiage Southwest reserved the right to cancel its flight due to “operational need” or for any other reason including, without limitation, weather, labor shortage, work stoppage, alien invasion, pastry embargo, overtime hockey, or a blowout sale at Williams Sonoma. The purchaser’s only right is to sit by the phone steamed, wondering how to get from Point A to Point B at the last minute.

What set Southwest apart from other airlines and vaulted it to popularity among travelers – aside from its moronic open seating practice – was an uncanny ability to humanize air travel. It removed the role of social status from flight. There was no first class. The pilots, flight attendants, terminal workers, and front office staff were held out as peers of the passengers. Southwest would get you from Point A to Point B less expensively and with less hassle than the others.

If you’ve ever tried to board a flight on US Air, you know that you first must determine if you’re classified as Silver Preferred, Gold Preferred, Bronze Standard, Tin Ear, or Wolfram CoCo Puffs. From this information you divine whether to use the blue special lane, red commoner lane, or purple lane for underachievers before you even think about trying to get on the plane. Southwest dispenses with all of that noise. Get on the plane. Fly to your destination. Get off the plane.

Or at least it did. When Southwest starts treating its customers with the same contempt exhibited by all of the other airlines . . . and banks, insurance companies, cell phone providers, power companies, and so on . . . it loses its competitive edge. A company that made its name on good people skills could easily become another money-loser in an industry already rife with them. So a piece of unsolicited advice to Southwest Airlines: Your contracts no doubt let you treat people as poorly as you treated me. Your business model does not; in fact, it depends on continuing to make air travel accessible to the masses. Stick to what made you popular or you’ll quickly become another low-end carrier with dirty planes, snarky employees, and an ever-dwindling pool of pissed-off customers.

And that would be madness.



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**Trippe Fried** is a lawyer who works with entrepreneurs and businesses and is launching a new tech company that allows businesses to build a legal department in the cloud.





## Rural Lawyer - The Ides of Tech

As I write this, it is abundantly clear that for the little law office on the prairie, Persephone has not yet returned to Demeter's loving arms and the only technology I'm actively searching for is a front end loader with a longer reach.

Out here, the size of the clean-up technology is fairly accurate gauge of a winter's severity; a mild winter may never rate more than a simple snowplow to push the snow from the drive (FYI, when it is more convenient to refer to your driveway's length in fractions of a mile than in feet, shovels are automatically obsolete), a normal winter's driveway clearing may require hauling out the skid loader or a snowblower (this is a device that is attached to the backend of a moderately sized tractor and capable of chewing an 8' wide path through your average snowbank or small compact car), and then there are severe winters.

These are the winters where the snow banks on the sides of the road turn 2 lane country roads into single lanes, driveways start to resemble a bowling alley with the gutter bumpers inflated, and sidewalks are simply trenches that occasionally open on to crosswalks and the technology escalates to the front end loader as the go to tool - it's not that the other tech won't clear today's snow fall, it's that we've moved from managing the single event to managing an entire season's worth of events. A severe winter means that we're not just moving snow off the drive, it means that once it's off the drive it will need to be moved somewhere for semi-permanent storage, someplace that won't interfere with daily operations and won't turn into a small lake once spring decides to make an appearance.

All of this is, to my somewhat but not entirely unfrozen neurons, a somewhat useful but terribly stretched analogy for data storage strategies and technologies.

When it comes to sweeping data from the electronic version of your drive (be it an inbox, a desktop, or a hard drive), where you put the detritus is a fair gauge of the data's importance. The ephemeral bits, like that animated gif from lolcats, can be safely stored in the equally ephemeral and almost ubiquitous USB stick drive (preferably, that 1 Gb bit of swag you got at last month's convention).

For the useful but relatively static and replaceable, one hauls out the backup software and drops these files into a once-a-month schedule. I know, not very strategic but it is better than loading this junk back in from original sources (you do keep the original sources some place off-line don't you).

Then there is that mission-critical stuff. You know, the stuff that, should it vanish into the dimension of lost coat hangers and single socks, will turn your hair gray, your stomach into knots, and bring the dark side of the PR board down upon you. The stuff that deserves the big guns - a RAID array and incremental backups to both internal and external locations. Just like a severe winter's snow, this is not about simply keeping our electronic desktop clean, it is about managing the semi-permanent storage of our business' life blood and when it comes to electronics, semi-permanency requires redundancy. Remember:

- 97.3% of hard drives last 3 years
- Optical media averages 25 years before stored data becomes inaccessible
- Magnetic tape averages 100 passes before degradation begins
- Someone always wins the lottery

And the goal is to make sure that should you win, the melt won't turn your thriving practice into a puddle.



**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>



# Far From the Madding Crowd ...

You know, sometimes, being a virtual paralegal can be challenging. For that matter, being a self-employed anything can be trying. Still, the benefits far outweigh the burdens.

When I worked for BigLaw, I'd get up at the crack of dark to steel myself for the commute down I-75 South to Midtown Atlanta. Now, technically, my commute was only 18.6 miles door-to-door. On a good day, that translated to 45 minutes on the freeway. I never really gave it much thought; after all, we Texans take it for granted that it will take *at least* 30 minutes to get anywhere we really want to go. (Y'all know I'm *from* Texas, right?)

It didn't really become an issue until the city planners decided to take down and rebuild the 14<sup>th</sup> Street overpass. Let me clarify, my commute was practically a straight shot down 75. I hopped on the freeway about a mile from home and jumped off at the 14<sup>th</sup> Street exit. (Our offices were at Peachtree and 14<sup>th</sup>.) Typical of Atlanta, the exits for Midtown weren't really designed for ease of access until you're south of 14<sup>th</sup> Street, so exiting early wasn't a viable option.

Have I mentioned that Atlanta doesn't actually have a logical system in place for practical, alternate routes? I sorta needed that overpass to get to my office. Back home we have feeder roads – hop off the freeway, drive past the problem, jump back on. Here, not so much. Ugh! It doubled my 45 minute commute.

The madding crowd indeed!

That insanity lasted about 6 months – until BigLaw and I parted ways. Now that I'm on my own, my commute is a leisurely walk down two flights of stairs; my office opens onto a large pond populated by ducks, geese and an occasional blue heron; and my cats remind me when I've been working too long/too hard.

I have so much more control over my life – don't get me wrong, I still work hard and I put in a *lot* more hours now than I did in my previous incarnation as a law firm paralegal – but I set those hours. I get to choose my clients, work in an area of law that is meaningful to me, and I decide when and how I want to work.

I'm so much more creative than I was before – I blog, write, present, and teach. And the best part of working virtually is that I do all of that, and have the flexibility to travel (without having to ask permission from a supervisor), while remaining productive. As long as I have my laptop and an Internet connection, my office is anywhere I want to be... away from the hustle and bustle of everyday, city life.



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**Pamela J. Starr, CBA, J.S.M.**, Virtual Paralegal Extraordinaire and tenacious redhead from the GSOT. As the lead paralegal and owner of **StarrParalegals, LLC**, Pamela also



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## TLCxn Community Calendar

<b>Fri Apr 11</b>	11:00am – 11:45am	☒ <a href="#">First #legalchat Twitter Party starring</a> - twitter chat ☒
<b>Mon Apr 14</b>	12:30pm – 2:00pm	☒ <a href="#">Lunch LIVE with LegalTypist</a> - The Main Event, Plainview, Long Island, NY
<b>Wed Apr 23</b>	12:00pm – 3:00pm	☒ <a href="#">Lunch LIVE with LegalTypist - NYC</a> - New York City
<b>Fri Apr 25</b>	12:30pm – 2:00pm	☒ <a href="#">Webinar: Get Organized w/LegalTypist</a> - TLCxn Webinar Room
<b>Fri May 9</b>	11:00am – 11:45am	☒ <a href="#">#legalchat</a> - twitter chat ☒
<b>Mon May 12</b>	12:30pm – 2:00pm	☒ <a href="#">Lunch LIVE w/LegalTypist</a> - The Main Event, Plainview, Long Island, NY
<b>Fri May 30</b>	12:30pm – 2:00pm	☒ <a href="#">Webinar: Security In Our Mobile World</a> - TLCxn Webinar Room
<b>Thu Jun 5</b>	All day	☒ <a href="#">Indiana State Bar Solo/Small Firm Conference</a> - French Lick, IN, United States
<b>Fri Jun 6</b>	All day	☒ <a href="#">Indiana State Bar Solo/Small Firm Conference</a> - French Lick, IN, United States

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