

Law Practice Tech Tips

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1. Case Management Software.

Legal Case Management Software (CMS) is software that helps lawyers and law firms manage their law practice. CMS can do things such as manage case and client records, track timekeeping and invoicing, accept online and ACH payments, schedule appointments and deadlines, manage documents, track and manage leads, assist in conflict checking, communicate with clients through a client portal or texting using a business phone number, and more. Most are cloud-based so it is easily and securely accessible 24/7 from any location with internet access. There are many advantages to using a CMS, but in summary they promote more efficient workflows by streamlining processes, reducing errors and decreasing inefficiencies, and they allow a law firm to see everything going on in the practice, from the small details to a “10,000” foot view, in one application.

By being a member of the Alabama State Bar (ASB), there are a number of CMS providers that will give you a discount. These CMS products are Clio, CosmoLex, EasySoft (Real Estate), MyCase, and Rocketmatter. Some other Legal CMS products include CASEPeer (Personal Injury), Filevine, LEAP, Lexicon, Needles, PracticePanther, Smokeball, Tabs3, and Zola Suite. All of these offer free trials, and will be happy to give you as many demonstrations, webinars, videos as you want, so consider checking them out. Ask other lawyers what they have used or what they have seen.

If you already have a practice and decide to proceed with subscribing to a CMS, you must decide if you are going to transfer your existing CMS or method to the new CMS, or if you are just going to start with new cases. If you are going to transfer cases, be sure that your CMS provider has a specific plan for you that you understand (they call it onboarding and most have a specific representative assigned to you for this task), but also understand that you may end up having to just start fresh with new cases.

2. Microsoft Teams.

Another option for CMS is Microsoft Office 365, including Microsoft Teams. There are many law firms using Teams to run their firms and there is a wealth of tips and instruction available on the internet. The following link is to a video on an introduction to Teams made by Catherine Reach with the North Carolina Bar Association’s Center for Practice Management:
<https://www.youtube.com/watch?v=5BHuQopg-Q4>.

3. Calendly.

There are several free to low-cost scheduling assistance applications out there. Calendly is a very easy to use scheduling app that allows a user to select a day and time to meet with you based on your availability. The app syncs with your calendar so the user will only see those dates and times that are available. <https://www.calendly.com>.

4. Spoken Content on smart phones.

Settings for Spoken Content on smart phones and devices are found under Settings > Accessibility > Spoken Content. Once activated, an option for your device to “speak” will appear for selected text. In addition, you can also turn on the ability to have your device read all text on a screen by swiping from top to bottom with two fingers.

5. Clipboard history.

Type “Clipboard Settings” in Windows search to turn on Clipboard History. This enables clipboard to keep a history of all items cut or copied, including pictures and videos. It may also be configured to share your clipboard history between devices signed into the same Microsoft ID.

6. Royalty free images.

Do not use licensed photos without permission. There are many sources of free stock images, including within Office 365 applications. Some other sites include Pixabay, Pexels, Unsplash, StockSnap, and Adobe.

7. Google Business Profile.

Formerly called “Google My Business,” Google Business Profile is a tool that allows a business to manage their online presence across Google, including Search and Maps. It is free to set up. One of the best ways to help you appear at or near the top of google search results for people that are searching for an attorney is to make sure your profile contains good client reviews. It never hurts to ask, and I recommend bringing it up early in your representation and reminding your client again at the end of your representation. Consider sending an email or text at the end of your representation asking for a review and showing how easy it is. Be aware that should Google find out that your reviews are not genuine clients, you could be banned from the platform. Asking for these reviews may seem like an unnecessary hassle, but other lawyers are already doing it and their information will appear before yours unless you are prepared to spend money for paid advertising. Go to <https://www.google.com/business/> to get started.

8. Visit <https://www.alabar.org/members/benefits/> to find out more about Ruby and Smith.ai phone reception services. There you can also get more information about the ASB member discount. The bar commissioners have recently approved a similar service, called LexReception, which is strictly focused on legal services. We will be updating our member benefits with their information soon. Here are some resources provided by one of our benefit vendors on working with remote paralegals: <https://www.clio.com/blog/remote-paralegals/>. Also, consider looking online for regular or periodic remote employees. There are many websites and services that connect employers and employees, such as <https://www.upwork.com/> and <https://www.fiverr.com/>.

9. To Do apps.

There are several free and paid for “To Do List” apps available. If you have Office 365, then you already have Microsoft To Do. If you do not, you can get To Do for free with a Microsoft account. I like To Do because of its simplicity, which is what I was looking for, but there is a lot of flexibility in the application so if you are looking for functionality, give it a look before paying for a similar app. Some of the simple things I like about it: very easy to add lists, add tasks to list, add steps to tasks on the lists, can add different backgrounds to the list so I know which list I’m viewing at a glance. For those users that use a lot of Microsoft Office products and features, there is a lot of integration here. Outlook users can synchronize tasks from Outlook, so now you can sync Outlook tasks to mobile. You can add tasks using Cortana or by typing in the Start menu. For example, if you type “add rice to my shopping list,” rice is added to a list called “Shopping.” If you are looking for more features, look at Microsoft Planner, or an app called Todoist that has good reviews and is \$4 month or \$36/year.

10. Microsoft Planner.

If you have Office 365 Enterprise E1-E5, Business Essentials, Premium, or Office 365 Education, then you have an app called Planner. Think of it as a more advanced and integrated version of Microsoft To Do, but not quite a legitimate project planning application. To find Planner, login to Office.com and click on the “app launcher” (icon on far left with 9 dots), then click on list all applications. Planner allows you to create “buckets,” add tasks to each bucket, and assign specific details and dates to the tasks. Like a CMS, it also allows you to see charts and track progress of your tasks and buckets.

11. Password Managers.

Use strong, complex and unique passwords. Yes, your passwords are for sale on the dark web. And when there is a breach at one place, you have to change them all. For your law practice apps and websites, do not use the same or simple passwords. Here are some free or cheap password managers: Bitwarden, Lastpass, 1Password, Keeper. Some have free and paid versions; some do free trials. I used the free version of Keeper for a long time and just backed it up to my computer, but recently I paid for it and it is backed up in the cloud. I keep the app on my phone, locked with face recognition. It allows me to have unique passwords on different websites and apps, but I can just pull it up on my phone when I cannot remember one.

12. Alabama Small Business Development Center Network.

If you are thinking about starting your own firm, or if you want to grow your firm, and have business questions, the Alabama Small Business Development Center is a great resource. Everything they offer is free. They offer assistance with everything from creating a business plan, to marketing, to helping with finding and applying for financing, grants, to disaster planning. They have free workshops and webinars, but they will

answer your specific business-related questions. You will find a lot of information on their website, but if you register, you will be contacted by a Professional Business Advisor in your area for one-on-one assistance. They are not focused on legal practices and do not give legal advice, but this is a great resource for business advice. They will not do things like write a business plan for you, but they are eager to answer questions and help you any way that they can. <https://www.asbdc.org/>.

13. Fastcase.

A significant benefit of your Bar membership is access to Fastcase, which provides FREE legal research for all members — a value of approximately \$2,000 a year. ASB used to provide Casemaker, but it was acquired by Fastcase. Westlaw and Lexis are great legal research tool, and it is easy to be comfortable continuing to use them because that is what you are comfortable with and used to, but they are very expensive. Change is hard but saving that monthly payment could be worth it. Fastcase allows members to search an extensive database including Alabama Caselaw; Alabama statutes; U.S. Code; Courts of Appeals; and more.

To access Fastcase, go to the ASB homepage and click on member login. After you are logged in, there is a link on the left side that states “Fastcase.” From the Fastcase homepage, you click on the question mark in the top right corner, and you will find great video tutorials as well as an extensive user guide. Also, you can sign up there for free webinars that are given on a regular schedule that cover different aspects so you can find the one you need or that interests you and not have to watch those you don’t need. If you are one who has not tried Fastcase much or at all, or just interested in using it more effectively, I will be scheduling some more CLE webinars with our Fastcase representative so you can learn more about this great, free resource, and bring your own questions.

14. Quick Access Toolbar.

Quick Access Toolbar is a new enhancement for some Office 365 applications, such as Word, Outlook, Excel and PowerPoint. You can design your own quick access toolbar in these applications to perform any command you can find in the app. You can turn on this feature by going to the File tab, then Options, then Quick Access Toolbar. Check the box next to “Show Quick Access Toolbar.” You can customize your toolbar by looking for a command on the lefthand side, highlighting it, then clicking on “Add.”

15. Dictate and Transcribe in Word.

There is a tool in the Office 365 office suite that will let you dictate a document or email. For more information about how this works, check out <https://www.ncbar.org/2020/09/22/the-power-of-speech-voice-options-in-ms-word/>.

16. Desktop Dry Erase Board.

Replace sticky notes and note pads with a desktop size dry erase board. There are several affordable models on Amazon.com.

17. Graficto.

Graficto is a useful app for trial work as far as exhibits when you want to show a timeline of events, or maybe even a client presentation, demand package or anything in which you need to show a graph of flow or relationships. Graficto has a free and paid version. They have really sharp, high-resolution images to make potentially boring information more interesting. They have a lot of useful templates, or you can start from scratch. <https://graficto.com/>.

18. LawPay.

LawPay is a payment processing application that allows you to process client payments safely and securely. LawPay is very organized and intuitive, and it offers a lot more than just payment processing. You can add multiple accounts so you can setup your IOLTA trust account and LawPay knows to keep the accounts separate, and to never debit from the Trust account. You never want to assume you are in compliance with the Rules of Professional Conduct because you are using a product that purports to do that for you, or because they offer a discount thru the bar, but it is good to know that this can assist you with keeping those accounts separated. It is integrated with a lot of CMS and other products. When you send a bill to a client, it is in very user-friendly format for your clients. They work with a lot of firms and bar associations. Through ASB, you can receive up to 25% off of standard and debit card fees. Click on the link on the ASB website's member benefits page to get started and find out more.

19. Simplyfile.

Simplyfile is an Outlook add-on that could be very useful if you are a fan of using lots of folders in outlook to keep your inbox clean and organize your emails. It has a 30-day free trial, which mine has been expired for a long time but at least the basic functions still work. Otherwise, it is about \$35 per year for Standard; \$60 per year for Pro. Rather than moving individual emails to folders by click and dragging, possibly dropping them in the wrong folder, Simplyfile aims to, over time, "learn and adapt to your filing habits," which means it will try to predict which folder you want an email to go into. So, when you get an email, on the ribbon it will list the possible folders it thinks you would file this email. You can click on one of the options and the email is stored there with one click. Or you can click "File In" button to bring up list of all your folders and click on the one you want. Or you can click "Quick Pick" and type in the folder name. It has a ton of other options as you can see here. It has optional predictions for sent mail and it will prompt you to save sent messages into folders while also saving a copy in your Sent folder. It starts at \$3/mo per user. Also, Techhit, the makers of Simplyfile, has an app called SendAware that prompts you to confirm email recipients before you email. It also prompts you to confirm reply all, checks attachments, and more. It starts at \$3/mo. <https://www.techhit.com/SimplyFile/>.

20. Gmail Reverse Conversation Chrome Extension.

If you use Chrome and Gmail, you can use this simple Chrome extension to change Gmail to list the most recent email in a conversation on top of the exchange. To use, go to <https://chrome.google.com/webstore/detail/gmail-reverse-conversatio/kfgepjmmgamniaefbjlbacahkjijnjoaa?hl=en>.

21. Miro.

Miro is a free online collaborative whiteboard. Use this like a regular whiteboard, you can even use your writing device like iPad pencil, Microsoft surface pen and write on it, or use the tools Miro has like sticky notes. When collaborating you can see the other members actions on the screen in real time. So, if someone is working on a board with you, their avatar will show up, or you can turn on video chat. Miro allows you to have these giant whiteboards, but each person have their own area, and you can click on their avatar, find their area, add to it. Zoom out see the whole thing. And there are other tools. There are some ways you can use it to work asynchronously too. There is a comment tool that allows discussions in the middle of the project, like leaving comments on a word document, and it can send notifications out to the team. You can save it, export it to .pdf and it will make pages of the whiteboard and put in a single pdf. <https://miro.com/>.

22. Google Takeout.

Use Google Takeout for periodic archiving. Google provides a lot of free or cheap ways to securely store data, and yes, all you need is an internet connection. But when you run out of storage space, or you need to get to files when you do not have an internet connection, Google Takeout provides an easy way to download the data. It will export from 54 services. To see the full list, and to see how much you have of each, sign into your Google account and visit the Google Dashboard. For an example, I store all my photos on Google Photos and when I started, you got as much storage as you need with no storage cap. Well now there is a maximum and you have to pay for additional storage. So now that hard drives are cheap, when I reach the max, I can use Google Takeout to backup all my data and then I can wipe Google Photos and start over. Here is a link to an article discussing how to use it and suggests some other uses. <https://www.lifewire.com/what-is-google-takeout-4173795>.

23. Airgram.

Airgram transcribes your Zoom, Google Meet and MS Teams meetings. It also has powerful tools for note taking, before during and after, and collaboration. It seems very easy to use. It has a browser extension. I believe that it is free, at least for now. Their website states that tiered pricing is coming soon, but it indicated there would still be a free version. <https://www.airgram.io/>.

24. Outlook email templates.

Save time by creating email templates when you are sending the same information frequently. When you open or reply to an email in outlook, click on the button on the far right that reads "View Templates." Outlook has some generic templates, and you can click on "Template" at the bottom to add your own templates. Clicking on a template will past the text in the body of the email to be sent or edited.

25. Review Word documents for inclusiveness.

There is a fairly new feature in Word that allows you to check for inclusive language. To turn on the language checker go to File > Options, choose "Proofing," and then click the "Settings" button. Scroll down until you see "Inclusiveness." They may have changed this in an update, but initially it was turned off by default but when I checked mine, it had all options under this section turned on except for two.

26. Goodbits.io.

A blog or an email newsletter is a good way to keep in touch with clients, and help you hold yourself out as someone who stays on top of particular areas of the law. Maybe you don't have time for a blog or to write enough original content. Consider an email newsletter. Goodbits.io lets you save articles from the web and turns your bookmarks into weekly digests or newsletters. It allows you to build an email newsletter very quickly, without code or design experience. <https://goodbits.io/>.

27. LinkedIn name pronunciation and profile video.

In LinkedIn, you can add an audio clip of how to pronounce your name. You must set this up in LinkedIn app on your phone, not on the website. Navigate to your profile, click on pencil icon to edit your profile, and look for section "Name Pronunciation." Click on pencil icon by that and it will open a record button to press and hold that will record you saying your name. Then people can click on the speaker symbol by your name, either on website or on app, and hear your name. You can also add a video introduction of up to 30 seconds that will pop up where your picture is by going through the app only, click on the plus sign on your picture, then click add profile video. It will start playing automatically when someone visits your page, or when they click on your picture from your page. If you do not have a LinkedIn profile, you are behind the competition. Check out [this blog post](#) for some more LinkedIn tips.

28. Lawyer Referral Service.

The State Bar hopes that you will consider participating in the Lawyer Referral Service (LRS). It is a great way to gain new clients. The program is designed to assist members of the public who can afford to pay a lawyer, but do not know how to find one. All panel members of the Lawyer Referral Service must be licensed in Alabama, must be members in good standing of the Alabama State Bar, and must maintain professional liability insurance coverage of not less than \$100,000/\$300,000 in order to participate. In 2021, we made 11,701 referrals to lawyers, from callers to the LRS help-line at the bar.

We receive thousands of calls a month and make about 50 referrals a day. If you are new, or been around awhile, and your phone is not ringing enough, consider signing up for this. More information may be found on the ASB website:

<https://www.alabar.org/programs/lawyer-referral-service/>.