Harnessing Technology to Make Your Law Firm More Efficient & Profitable

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The Case for Case Management

- All-in-one matter management
  - Opening, linking, closing matters
- Sync with Contacts and Calendars
  - Dates and deadlines reminders
- Supervise others
- Dashboards and reporting
- Conflicts of interest
- Automated time and billing
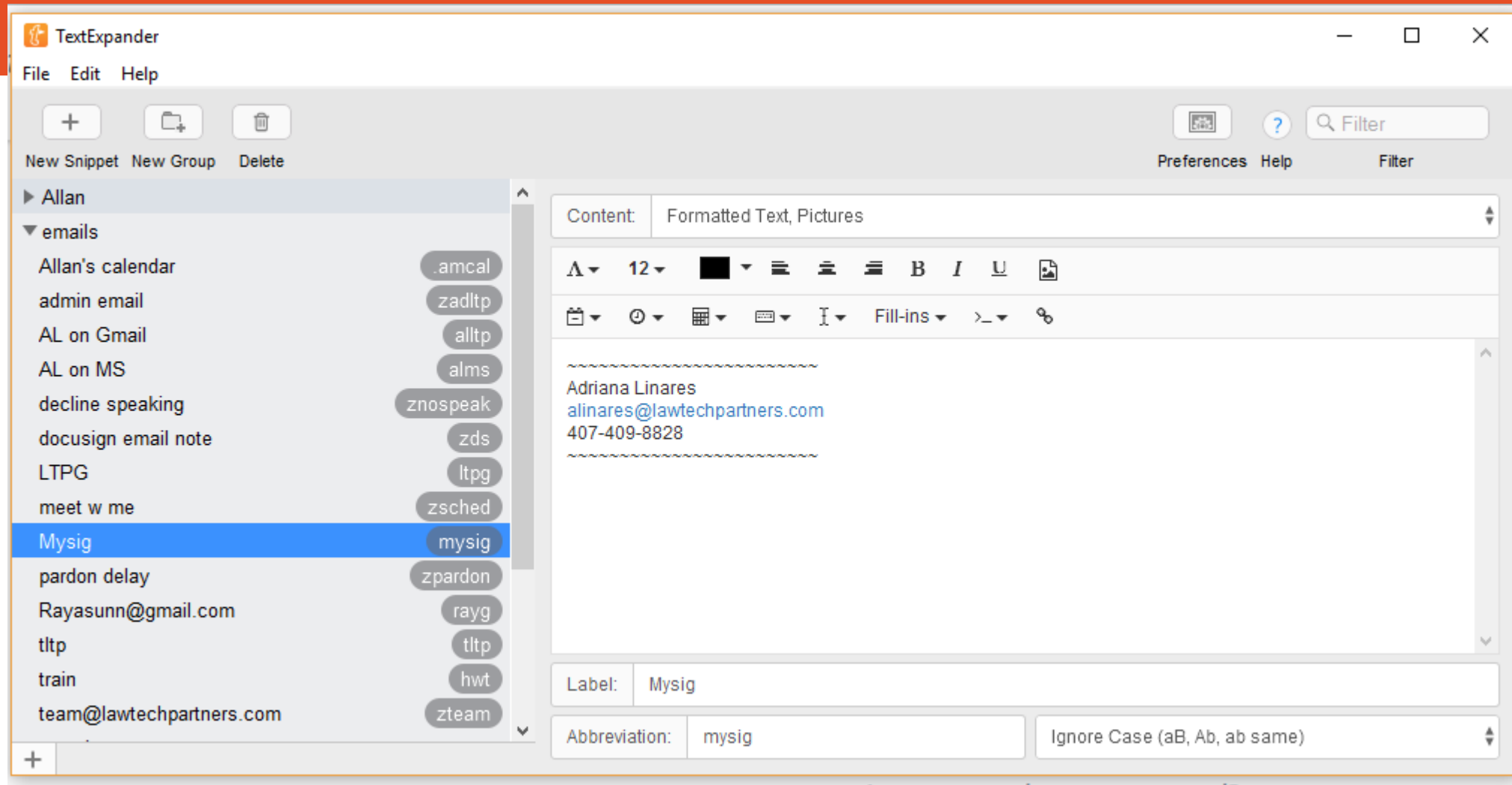
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Consider Client Portals

- Clients now expect
  - Access to their documents 24x7
  - Access to WIP before the bill arrives
  - Notification of all key milestones
  - Live feeds of all significant case activity
  - Threaded discussions
- Secure client communications
- All matter files and communications in one place

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Text Expansion

- Keyboard shortcuts for a word, phrase, or sentence
- Save time, reduce typing, avoid a repetitive-stress injury
- Reduce errors
- tylf = *Thank you very much for your time, we look forward to hearing from you.*

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TextExpander.com

Password Managers

- The best protection against hackers is to have different passwords for each website.

- DON'T common passwords, because these are the ones that hackers have scripts to check for first.

- Use a password manager for BUSINESS

- Major time saver for filling out forms

SplashData's Worst Passwords of 2024

123456
123456789
picture1
password
123456789
12345678
12345
111111
1234567
senha
qwerty

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Consider PassPHRASES

- Passwords are easier to cracked than passphrases

- A passphrase is harder to crack

- Major operating systems and applications support passphrases

- A passphrase satisfies complex password setting rules

- Passphrases are easy to remember

Oh when the Saints come marching in 2025!

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Dealing with Documents

- Document management systems
  - Dropbox vs NetDocuments
- Document Automation
- Document creation
  - Forms/templates
    - Consistency in look and feel
    - Word Styles
  - Autotext, autocorrect
  - Text expansion tools
- Signing docs

Timekeeping & Billing

- Assisted timekeeping
  - Case management
  - Chrometa
  - Phone calls
- Text expansion
- Invoicing & Collections
  - Customizing rates and invoices

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Dealing with Money

- Case management dashboards
- Assisted / integrated IOLTA management
- Banking / Wire transfer security
- Monthly Reports
  – Balance Sheet
  – Income Statement
  – Bank Reconciliation
  – Bank Statements
  – Detailed General Ledger

A financially competent attorney will have a financially healthy law firm.

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Security

- Learn to Scrub metadata, truly redact documents
- Encryption
  - Information
  - Hardware
  - Employees
- Require password to open apps like Outlook
- Make sure your account settings in Gmail, Twitter, Facebook and other tools are set for the highest privacy and security settings
- Do not open unknown unexpected attachments from unknown senders (use preview)

Look for Tools and Tech That...

- Increases security
- Facilitates communications
- Reduces repetitive tasks
- Enhance mobility
- Has personalization options
- ARE EASY TO USE

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Thank you!

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Adriana Linares is a legal technology consultant with her company, LawTech Partners. For 25 years, Adriana has used her practical and personal approach to help legal professionals use technology to maximize their skills, run profitable businesses, and deliver superlative client service. Listen as she disarms successful lawyers and industry experts with her wit and humor and gets them to divulge their pearls of wisdom on monthly episodes of the New Solo podcast . Learn more about Adriana at https://lawtechpartners.com .

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