A Short, Helpful Guide To The

Top Technology Resources for Lawyers

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Table of Contents

[Introduction]

Technology can seem magical, but that's just an illusion. For most lawyers, technology is usually frustrating. Fortunately, this problem can be avoided, or significantly minimized.

The trick is to zero in on the right "tech magic", the stuff that packs the most punch. I've assembled my best power-packed tech tips in this handy guide, and provided direct links to the services, websites, and tools I recommend.

If you're typing the links from a written version of this guide, make sure to capitalize letters where indicated.

Also, for more valuable free resources sign up to become a V.I.P. Member of **LawFirmAutopilot.com**

"Any sufficiently advanced technology is indistinguishable from magic."

– Arthur C. Clarke

Mindset

Lawyers who build thriving practices don't do it by accident; they have the right mindset. They work from a clear vision of the kind of practice they want, and then incorporate elements that lead to that goal.

Technology is just one part of the equation, and obviously it's important one. But maintaining clarity and focus in a busy world is even more important.

Here are three resources that to help you create and maintain the right mindset:

1 **Headspace** - a subscription based guided meditation service with a convenient smartphone app. Try the initial 10 minute guided sessions for free to see how well it works for you. Once you have an established daily meditation practice you'll be amazed at how much better your focus is, and how much more resilient your emotional stability is. **[goo.gl/ZgFF6p]**

2 **The Power of a System**, book by attorney John Fisher - a detailed manual on how to build and use systems in your solo or small firm law practice. Absolutely invaluable for creating a smooth-running law firm. **[goo.gl/1naMcm]**

3 **MindOverMatter** - private Facebook group run by Lexlee Overton, a 5th generation lawyer in Baton Rouge, Louisiana who now helps fellow lawyers stay focused on the truly important stuff. Join for free and learn the secrets of melting away stress (and more!) **[goo.gl/dbeWqh]**

Productivity

Technology can save you time and make you more efficient in all kinds of ways. But some tech tools are more essential than others.

Here are a couple of important ones that I recommend:

TextExpander

Lawyers crank out a lot of text. A lot of the text is repetitive chunks that could easily be recycled. Sadly, most lawyers recreate the wheel when it comes to those small chunks of text, or even with larger blocks. If only they knew about **TextExpander**.

It works on Macs and PCs and even on iPhones. And yes it takes a bit of time to learn. Mostly the hitch is you have to remember to use it. Once you grasp its power you won't forget. In fact, you'll find it impossible to use a computer that doesn't have it installed.

[goo.gl/s9YLqS]

Eero WiFi

If you use WiFi in your home or office then you need to ensure that it's running at peak performance. I have been using the **Eero** system for a year and heartily endorse it both for performance and ease use (and set up).

You can pair multiple units together to get WiFi coverage over a broader area. And you'll see a performance boost too. There is a handy smartphone app that you can use to check the status of your network, which is surprisingly helpful.

[goo.gl/z77xmp]

File & Document Management

You absolutely must keep your digital files organized, and most attorneys do a pretty good job. If you are a solo lawyer you have the luxury of not having to figure out how to mesh your system with anyone else.

As you add more computer users in your firm the odds of mishap in managing digital files goes up. Also, there's the issue of restricting access to some files, which complicates the file-management process.

Obviously any system you use has to be cloud-based or at least cloud-compatible. **Dropbox**, **Google Drive**, **Microsoft OneDrive** all meet that criteria.

Slightly more robust (and business-focused) are **Box.com** and **NetDocuments**. For exceptional lawyer-focused guidance on managing digital documents I recommend my good friend Craig Bayer at **Optiable.com**.

He's the most knowledgeable, trustworthy guide I've come across, and his website has tons of great free resources.
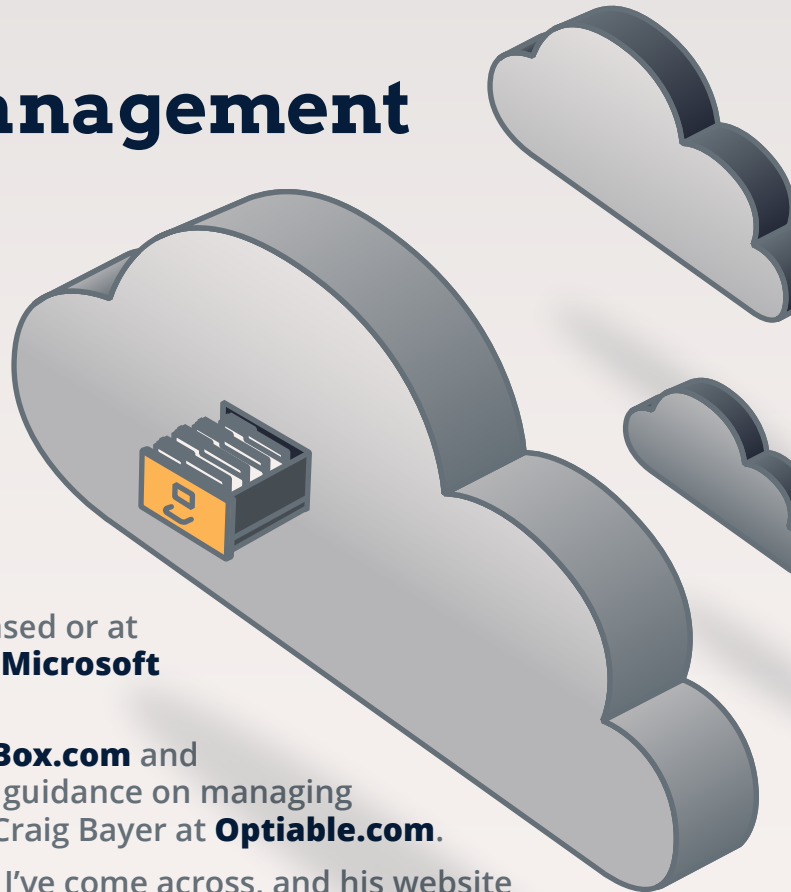
Finances

You must manage your finances properly. I'm referring to bookkeeping and accounting issues, as opposed to time-tracking and billing.

For recent law grads on a tight budget, I can recommend **Freshbooks** [bit.ly/FreshbooksSignUp]

For most lawyers it's best to set up your accounting with either of theses cloud-based services: **Xero** or **Quickbooks Online**. You should have an accountant/bookkeeper, in which case they'll probably steer you towards **Xero** [bit.ly/XeroSignUp] or **Quickbooks Online** [quickbooks.intuit.com/online/].

If you don't have a bookkeeper then you should look into **Kahuna Accounting**, a sterling quality virtual bookkeeping and accounting service that helps solo and small firm lawyers keep their finances perfectly organized without lifting a finger [bit.ly/SignUpKahunaAccounting]
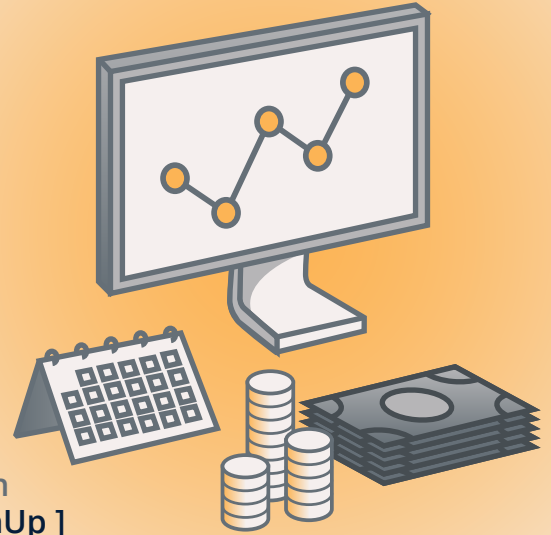
Email

Plowing through your email inbox is a chore. Setting up automated filtering is technologically challenging for many people, and it takes time. Why not let a computer do intelligent filtering for you?

That's what **Sanebox** does. They intelligently filter most of your inbox emails and move them to a separate folder you can check once a day (or whenever you want to if you are worried you'll miss something). The service learns your preferences as you work with your emails, and is constantly adjusting its intelligence.

Bottom line? You'll only see the most critical emails in your inbox during the day. And that's a stress-reducing game-changer.

[bit.ly/SignUpSaneBox]

Phones & A/V Conferencing

Besides your smartphone you almost certainly need an office phone. Your business phone system need to be a VOIP system (i.e. "Internet based). The leading VOIP phone service has been **Vonage**.

Check out their various packages and pick the one that makes the most sense for you. And if you want to upgrade to a better package later it's easy to do. But I'd opt for the business-class service at a minimum: bit.ly/VonageBiz

You should also sign up for a good conference calling service, preferably one that allows you to do video conferencing. The best and most affordable option here is **Zoom**: bit.ly/2mfepNn

Other Communication Tools

While email and phones are still great ways to communicate, they're not optimal for internal chats that happen in firms with three or more attorneys or staff members.

The fast-rising star of internal group communications is a service called **Slack**. The free level has no time-restriction, and is robust enough for most firms. The main benefit of Slack is that it allows you to segment group discussions by topic. To get a better sense of how Slack is used by lawyers, **read this post**: goo.gl/Up8po4

Another tool you should leverage is automated scheduling. Check out **Acuity Online Appointments**, and you'll be amazed at what's possible. Basically, you'll never have to deal with back and forth emails with people who want to book time to meet or chat with you. Truly amazing: bit.ly/2DFtH5i

Document Drafting

Lawyers all crank out lots of documents. Solo and small firm attorneys shouldn't be the ones to crank out those documents; that's secretarial work.

If you want to use your computer as your secretary, check out **Dragon Naturally Speaking**. Computer transcription isn't perfect but it's close enough that every lawyer should have a copy of Dragon and learn to use it. Get the PC or Mac edition depending on which computer you use:

Dragon PC - Home ($60) - bit.ly/DragonPCHome

Dragon Mac - ($200) - bit.ly/DragonMac

If you want to dictate to a human transcriptionist, then check out **Speak-Write**. You only pay for the service when you use it, so it makes sense to set up an account for those times when you can't dictate into your computer (i.e. when you're driving). **[bit.ly/SpeakWrite]**

Search Skills

Search skills are vital for lawyers in the modern world. And I'm not talking just about legal research.

You need to be able to do general research on the web for various reasons: education, product recommendations, witness investigations, and tech troubleshooting to name a few.

The best overall resource for lawyers who want to sharpen their web-based research skills is the website **Internet for Lawyers** run by Carole Levitt and Mark Rosch. [netforlawyers.com/]

They don't cover troubleshooting research so here's my quick tip. When you need to solve a tech problem, go to **Google** and start typing broad filtering terms like "*Macbook Pro stuck key…*" and you'll see Google start to suggest different searches as you add each word. Study the suggested searches and see if any seem to match your problem.

Ideally, you should see some similar matches. If you don't then you have a rare problem that might not be solvable by doing web research. Then you should start searching for someone to help you take over the repair or troubleshooting research.

Security

You must take all reasonable steps to protect your digital data from hackers and miscreants. You and your co-workers need to manage passwords sensibly, and that means you should use a password manager. There are three or four that are reputable and have been around for awhile; I recommend **LastPass** if you're not already using one.

LastPass has a free level that you can use forever if you choose, and the free option has all the features most attorneys need. You only need to remember one password to unlock your LastPass app, and then you can click to paste any of your various complex passwords quickly into any website.

LastPass also remembers your personal information (ie address and credit card numbers) so you can quickly click to fill that information in as well. Did I mention it was free? **Lastpass.com**

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Paperless Lawyering

Do you want your law practice to be so streamlined that it virtually runs all by itself? Then you need to shed paper.

Creating a paperless law practice will make your practice much easier to manage, and dramatically lower your overhead. Shifting to a paperless practice isn't difficult; lots of lawyers have done it. But some have had a smoother transition than others.

If you want to a step-by-step recipe for making a smooth transition (i.e.without any disruption or frustration whatsoever), then sign up for my free 10-part email course **How to Create a Paperless Law Office**: paperlesschase.com/free-course. I'll answer all your questions, and tell you which equipment and software are essential (e.g. exactly which scanner to get, with a link to the best place to get it).

The Cloud

The cloud is a vague, puffy term (pun intended). But you can just assume it means using the Internet to transmit digital data, or to store digital files that can be remotely accessed from anywhere.

Most software that used to be installed only on a local computer now have "moved to the cloud." In other words, most software is now available as a subscription service that you pay for month to month. You can still download the software to run on your computer, but if you stop paying the software stops working.

In general, you should prefer to use cloud-based software and services. You'd be upgrading the software from time to time anyway (if you're smart). So, using cloud-based subscriptions allows you to get upgrades automatically, and spread the cost of the software out over time.

Providers of cloud services also ensure that backups are done regularly and properly. Yes, there are security concerns, but most of those can be addressed by using a password manager and learning about the most common kinds of hacking attacks.

As long as you take sensible steps to protect the data you send through the cloud, or that you store there, you'll be fine. And you'll be free to work from anywhere, anytime.
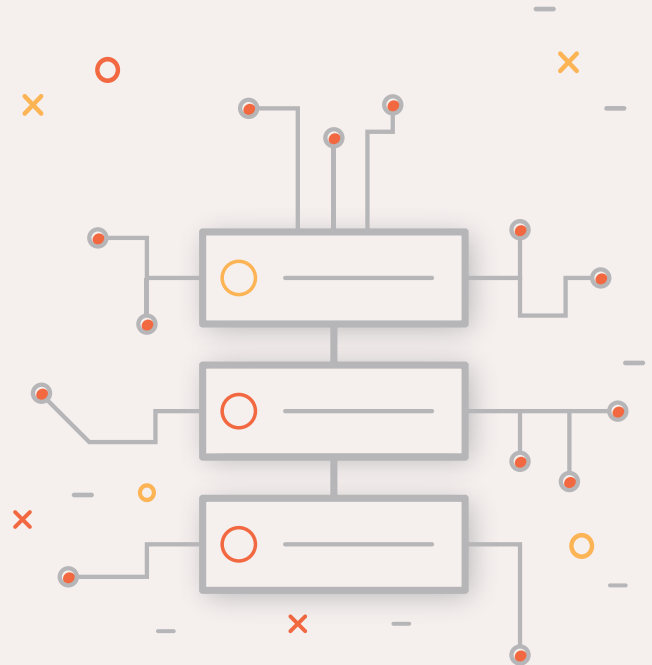
Mobile Lawyering

These days you need to be able to get work done when you're out of the office. Sometimes it's when you're at a coffee shop for a few hours, or sometimes it's when you're out of the country for a week or more.

Mobile lawyering requires you to be adept using your smartphone, tablet or laptop. And it means being able to connect to the Internet in various ways.

And most of all it means keeping your mobile devices properly charged throughout the day. Which is why I recommend you get a small portable (high-quality) charger for your smartphone. The one I depend on is the **mophie powerstation Plus Mini.** [amzn.to/2DHd0q6]

Delegation

You should only do tasks that require a law license to perform. Everything else should be automated or delegated. The good news is modern technology has made delegation easier and less expensive by virtue of outsourcing to virtual assistants.

Learning to work with virtual assistants is tricky for many lawyers, but if you develop your skills steadily, incrementally, you'll succeed.

Start by using services like **Fiverr.com** or **FancyHands**: bit.ly/FancyHandsSignUp

If you want to make it easier to attract high-quality clients use **Ruby Receptionists** to answer your phones. You'll be ecstatic and so will your clients. These days it's easy to annoy callers. Impressing them is easy, and affordable, when you use **Ruby**: callruby.com/lawfirmautopilot/

Finally, if you're looking for a superstar executive assistant, but can't afford a full-time helper then check out **Belay**: bit.ly/BelayVA

Also read this book by the co-founder of Belay: *Virtual Culture: The Way We Work Doesn't Work Anymore* - amzn.to/2E76dnr

START PROCESS
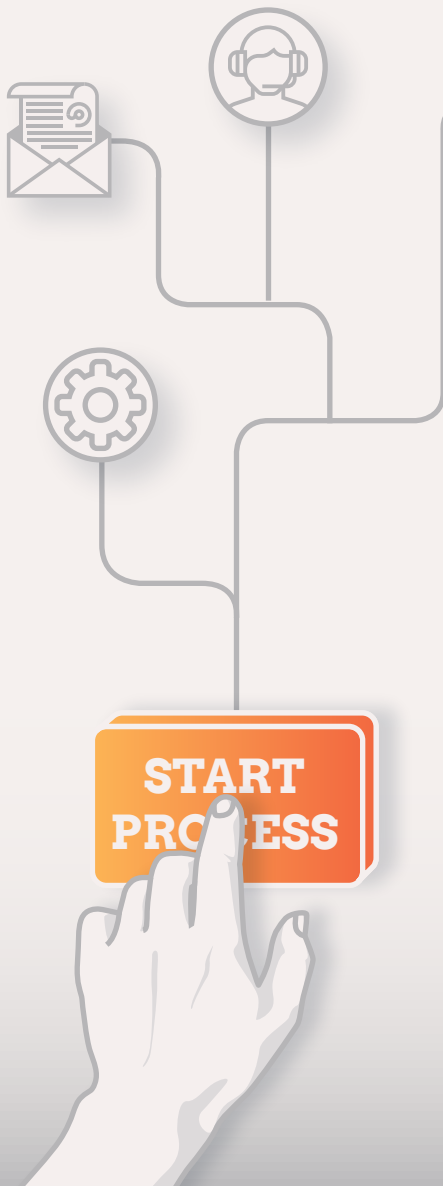
Marketing

Marketing is crucial to your practice. Done poorly, you'll struggle financially. Done right, you'll thrive and enjoy your practice.

Too many people make marketing overly expensive and overly complicated. The key to getting prospective clients to hire you is helping them to get to know you, then to like you, and finally to trust you.

Know, like, trust. This is the mantra. And the trust part is the most crucial aspect.

People need to trust that you're competent, but they also want to trust that you care and are truly empathetic. Finally, they need to get to know you in a way that's most comfortable and convenient to them.

The Internet is one easy way, but it's not the only way. So before you waste a lot of money on some "get clients fast" marketing consultant, make sure you understand the fundamentals of effective marketing.

First, read the book **How to Win Friends and Influence People** by Dale Carnegie. Then start implementing a low-cost referral marketing system (because referral marketing is the best, easiest, and cheapest way to get people to quickly trust you). Check out this website: growthbyreferrals.com to learn more.

Finally, before you start doing web-based marketing, read Dan Kennedy's book on direct response marketing, which is called **The No B.S. Guide to Direct Response Marketing**. There's a whole chapter in the book by a lawyer who mastered the art of direct response marketing and then found himself awash in great clients who were begging him to take their cases.

About the Author

Ernie Svenson practiced law in a big New Orleans firm for 20 years. His commercial litigation practice was filled with ridiculous overhead and mindless bureaucracy, which left him burned out and disillusioned.

Then he learned to leverage technology to create a simpler, easier-to-manage practice. And his low-cost "**Ernie the Attorney**" weblog enabled him to get a steady flow of lucrative work, which made his solo practice financially successful as well.

Now, through his **LawFirmAutopilot.com** website he helps fellow lawyers build their own dream practices. Ernie is a nationally recognized speaker and author on various topics such as paperless lawyering, email efficiency, document automation, and online marketing.