



# The Legal Connection

where legal technology & people connect

2012-05

## May Theme = Different

The theme this month is "different". What tech do you think of or use differently...

Me? I think I'm the only one who thinks of Google as I do ... getting increasingly freaked out at how much of a monopoly it has on the keystrokes of human existence – and how best to "only" use that information to advertise to it's own users.

In fact, Google has spawned an entirely new breed of normal – continuously connected through multiple devices – giving freely of every facet of your existence. All to be indexed, cataloged, keyworded and stored for ever more. And for those keystrokes to only be accessed by Google. For ever more.

K. 'nuf bout that ... ;)

My contribution is the BYOB Transcript of my conversation with Nerino Petro, Law Practice Manager of the State Bar of Wisconsin. Nerino recently toured the Google campus and shared with me some of his observations.

Barbara Nelson, as usual, brings her unique perspective to this month's theme with her contribution Rewire Your Brain (page 3).



Our resident Mac contributor, Joseph Bahgat, brings us tips on how to record a podcast with someone who is sitting next to you or half way round the world.

Bruce Cameron, the Rural Lawyer, reminds us that not everyone is as connected as those of us who are, and that that is not always a bad thing.

Allison Shields gives plenty of examples how attorneys can use technology to set yourself apart from local competition and better serve your clients.

Don't forget to check out the last page, click on the link to join the LinkedIn Group and take a peek at the upcoming events on The Legal Connection calendar.

Please note for your calendar (if you are in the area) on June 13, 2012, I'm hosting a Solosez lunch at The Main Event in Plainview. If you can make it, please RSVP.

til next month...



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# **BYOB Podcast**

## **T R A N S C R I P T**

Moderator: Andrea Cannavina, CEO/Founder, Legal Typist, Inc.

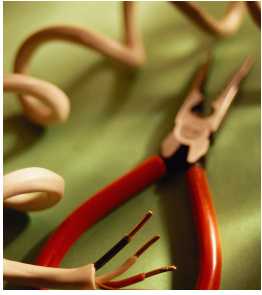
Guest: Nerino Petro, Law Practice Management Adviser to the State Bar of Wisconsin

Date of

Recording: May 14, 2012

Topics/Techs: Google, privacy, attorney duty not to disclose, Dropbox

<http://www.legaltypist.com/TLCxn201205>



# Rewire your BRAIN

I'm not a baseball follower, but I do know that Mariano Rivera is a rock star player and he's blown out his knee. The misfortune of his torn ACL was offset by the discovery of a blood clot, which might have gone undiagnosed if Rivera hadn't been examined. This baseball player made his way into this piece because of what he said during an interview I caught last night:

*"I'm a positive man...I believe that what is going to come from this...is something great."*

Wow. That was different than I expected. Looking him up, I found that he's also said:

*"Maybe this is a blessing...I always say things happen for a good reason."*

Do you think that Rivera's success has been fueled by these beliefs? [if not, move along!] This is a great example of something called the Be-Do-Have paradigm of happiness. You can google that term and find a lot of smart people who've written about it. What you need to know is this sequence:

1. Who and how would you be if you were happy?
2. What would you be doing that's different from today?
3. What would you have as a result?

The questions are important, but the action point is in the sequence. You'd think the first thing would

be to do things differently towards the goal of having something different in order to be happy. But no, the Ah-HA point of the paradigm is that you can start being happy, being the person you want to be, right now. This instant. "Happy" is a way of feeling. You choose how to feel. Surely you know people who always see the bright side or the glass half-full. Don't they seem happier? Less stressed and harder to rattle?

Got goals? Start by being happy. You'll find yourself taking actions in line with your goals and you'll eventually have the things you want as a result. Here's an easy example of how it works:

1. I am a successful woman. I'm happy that I'm meeting my financial goals.
2. My fees are where they should be, I don't give away work without fully intending to, and I have a pipeline of prospective clients.
3. I can afford to do whatever I want on vacation this summer.

Back to action. Rewire your brain this June. Set aside time. Think it through for yourself. What would be true if you were happy? Stop waiting. Start with happiness and use it to fuel the actions you take to get to the "have" part of the sequence.

Here's another quote to keep you focused, a classic from Earl Nightingale:

*"We become what we think about most of the time, and that's the strangest secret."*

You're the boss of you. BE happy. Right now, this very moment. Choose it. Whatever you think you need to do or have will follow as long as you stay present to your intentions.



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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>

## Podcasting... with a Mac

When properly incorporated into your workflow, podcasts (link to someplace with a good concise definition) can be a great way to get information with minimal effort on your part. Yes, it takes time to listen to them, but you can fit them in while you're doing something else that's relatively mindless, but not so mindless that you can read or edit documents on your iPad (i.e. when you're driving).

Later this morning, I'll be driving about two hours, to get to Atlantic City for the New Jersey State Bar Association Annual Meeting & Convention. For those two hours, I've set aside time to return a few admin-related phone calls, and catch up on the "new" podcasts in my queue (I put new in quotes because they aren't necessarily new by release date, it's just that I haven't yet listened to them). Although I subscribe to a handful of podcasts, the one that I always try to make time for is [David Sparks's Mac Power Users](#).

Until recently, I'd only participated in podcasting from a listening perspective, but that changed when I was invited to be a guest on the GoneClio podcast. To prepare for the GoneClio podcast was a piece of cake, thanks to my Mac and a decent telephone line/connection.

If both people doing the podcast have Macs and a POTS or VoIP phone line (it works best if you have a headset), the only other thing you need is a microphone on each end.

Garage Band is a Mac application that allows you to make numerous types of digital, multi-track recordings using voice, digital music files and even musical instruments.

As a bonus, Garage Band ships with every computer Apple sells so it's free! With Garage Band, all you need is a USB microphone. The app already has a pre-configured recording setting for podcasting. Bada boom bada bing.

Each person sets up Garage Band to record their own voice, but they talk to each other on the phone. After you're done recording, all you need to do is:

- combine the audio files,
- a little editing to sync the two conversations,
- mix it down,
- compress for the web and
- upload

That's all there is to it!

I was amazed at the quality of the #GoneClio podcast, especially since I was recording from my New Jersey office and Jack was in a hotel room — in Hawaii.



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**Joseph Bahgat** helps businesses and their owners involved in disputes over contracts, licensing, the Internet and intellectual property. A former professional musician, Joe specializes in music and sports entertainment law. Along with contributing to The Legal Connection, Joe writes The Sports & Entertainment Law Playbook for the LexBlog network.



### Gone Clio with Attorney Joe Bahgat

Listen as [Clio co-founder Jack Newton](#) talks with special guest, [Attorney Joe Bahgat of Bahgat Law LLC](#). Jack and Joe talk about cost savings through Clio, hiring a virtual assistant, tools to help you stay organized and the capabilities of Clio's document management and Clio Connect features.

# Answering Services vs. Virtual Receptionist Services: What's the Difference?

Answering services, virtual receptionist services, and call centers are all the same, right? Not quite.

Answering services and virtual receptionist services are similar in function, though their scopes are very different. If you forward your published number to them, they will answer calls to your office. But that's where most of the similarities end. Some of the differences can be seen in the following areas:

**The ability to transfer calls to you.** Many answering services only have the ability to take messages. However, live virtual receptionist services can connect calls to you live. You can even let them know when you're available and update your call handling instructions accordingly. Note: Sometimes answering services can patch calls through to you, but they may charge you an extra fee.

**Message delivering capabilities.** Even if answering services only deliver messages, they may not be able to get them to you conveniently. You may have to call in to check your messages, or they may "batch" them at the end of every day, so you may not get urgent messages until it's too late. Receptionist services can usually email and/or text messages to you immediately, so that even if you're in court or out running errands, you can respond to time-sensitive messages right away.

**Background noise.** Have you ever called your doctor's office and heard a low buzz of chatter and thought, "Sounds like the staff's gone for the day; I must've gotten the service!" Answering services are notorious for noise: lots of chatter in the background, even being able to hear other agents greeting callers from other businesses. Virtual receptionists are much more likely to have a quieter setting: more space between receptionists, higher cubicle walls, and noise-canceling headsets make it sound like they're in a lobby, rather than a crowded, bustling call center.

**Hours of operation.** Since virtual receptionist services function more like an in-house receptionist than a traditional answering service, they may not be 24/7. Typically, virtual receptionists answer live Monday through Friday and offer extended business hours. When they are closed, they can provide automated solutions like forwarding your calls to your cell phone or setting up a voicemail box.

Regardless of what type of service you're researching, a common issue among all the services is not having real, live people who answer promptly 100% of the time. If a large number of calls come in at once, your calls could roll to an automated greeting – and isn't that defeating the point? You may want to ask what happens to your calls if all receptionists or agents are on other calls.

And of course, the truest test is your experience. When you call the service, do you hear more than four rings before someone answers (if they answer at all)? Are you immediately put on hold for 10 minutes? Is the receptionist nice, friendly, and helpful? Try calling a few times to talk to several receptionists to get a feel for how your clients will be treated and have peace of mind that the service you choose will set the right impression for your firm -- and keep your clients calling you!!



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**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.





## Rural Lawyer : Different Tech

*It's pretty clear now that what looked like it might have been some kind of counterculture is, in reality, just the plain old chaos of undifferentiated weirdness. -- Jerry Garcia*

Different seems to be the watchword for today's new breed of lawyers; these rising stars with their different philosophies on billing, on marketing, and on the practice of law in general. We are seeing the birth of a legal counterculture, marked not by long-hair and tie-dyed T-shirts but by iPads, smartphones, and SaaS clouds.

Out here in small town America, the trappings of old, republican, conservative law die hard (there is still the expectation of brick and mortar offices, three-piece suits, and varnished oak desks) and one has to sneak different into one's practice slowly.

It is not that clients aren't receptive to different, it is just that they really don't care about it. Clients are interested in outcomes; more specifically, they are interested in paying you for solutions to their particular problem - they don't care about the process or what technology you use to expedite your research, they just want the solution to be palatable.

For the rural lawyer, technology's role is not as practice differentiator (well, there may be a few referral sources that will be impressed by a law firm's use of technology to implement a stream-lined, systems-based approach to handling client matters, but the average client won't care if you have a new smartphone or a 5 year old flip phone); technology's role is to simply improve your efficiency and reduce your costs.

In my one-man-band solo practice, technology is what keeps me sane. It allows me to have a human voice answer my phone and direct calls to me and it allows me to spend 30 minutes dictating a contract rather than 2 hours typing all without the overhead of having to employ actual staff. Technology allows me to run a paperless office secure in the knowledge that between my RAID arrays and backup software my business data will always be readily accessible. Tickler systems keep me on task, and e-mail filters help me manage information distraction.

The only thing different about my technology is that it's not different - no cutting edge open source software, no public SaaS clouds, no smartphones or tablets. The only new piece of technology I could really use is a typewriter (I'm really fed up with filling out the 3-part Certificate of Real Estate Value by hand). Perhaps retro will be the new different?



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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>

# Use Technology to Provide Better Client Service and Set Your Firm Apart

There are lots of ways lawyers can use technology to improve their practices. Many of these improvements will ultimately impact on the level of service provided to the client, but the improvements themselves may be invisible to the client. How can you use technology to set yourself apart from other firms by providing a direct benefit to clients – one that they can see?

## 1. Set up a Client Portal

Most lawyers hate when clients call and ask them the same questions over and over, or when clients are impatient and want answers immediately, even if the lawyer is in court or otherwise unavailable. A client portal – a secure place where clients can go to track the progress of their matter, view a calendar with upcoming dates related to their case, send messages to the team working on their matter, receive updates or review documents – can alleviate many of these concerns.

Clients log in with their own individual password to the site and they can view whatever documents, messages or upcoming dates the lawyer allows them access to. The client can get information or answers about what is happening on their case at any time, from anywhere (as long as they have an internet connection), thus eliminating many of those repetitive telephone calls and relieving the client's anxiety.

## 2. Collaborate with Clients on Documents

Put an end to endless rounds of emails, trying to keep track of versions of documents or forgotten email attachments. Instead, collaborate directly with clients on documents either through a dedicated client portal or through the many document and file sharing programs available.

## 3. Eliminate Unnecessary Client Meetings and Enhance the Rest

When clients have to travel to your office to meet with you, it costs them time and money (particularly with the skyrocketing price of gas!). But if the client doesn't need to be physically present to get the same benefit from the meeting, consider using technology to allow the client to meet with you from their home or office by using technology to hold a 'virtual meeting.' Use a webcam, services like Skype or Facetime if you need to see one another, or use a screen-sharing program such as Mikogo or join.me if you want your clients to see what you see on your computer screen.

When a client comes to your office to meet with you, do you go into a conference room where you are cut off from everything else? If a client asks a question about an upcoming date or wants to see a specific document from their file, do you tell them you'll 'get back to them' later, run to your office computer to check on the status, or call your assistant from the conference room to look it up for you? Why not use technology to enhance your client meetings by making sure that everything you need is at your fingertips? Whether you use a laptop, smartphone or tablet connected to your system, having available technology that allows you to reach your calendar, files, or the internet (for a quick check of the court's calendar for example) right there with you in the meeting can save time and demonstrate to clients that you're on top of your game – and their legal matter.

## 4. Make it Easy for Clients to Pay You

Every lawyer hates chasing clients for money. Use technology to make that task less onerous by setting up automated electronic payment systems. Get your firm set up to take credit cards with a merchant account through your bank, or get a device like Square that lets you accept credit cards right through your iPad or smartphone. Send clients invoices via email with a link to click to allow them to pay directly from the email.

These are just a few simple suggestions for how you can use technology to not only make your life easier as a lawyer, but to make your clients' lives easier. And the easier you make it to work with you, the more your clients will enjoy the experience – and the more likely it is that they will be loyal clients and refer others to work with you.



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**Allison Shields, Esq.** Formerly a litigator and partner, Allison is now the principal of LegalEase Consulting, Inc. a company devoted to helping lawyers avoid lawyer meltdown by creating productive, profitable and enjoyable practices.



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# 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

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May-June 2012

## Calendar

<b>Thu May 31</b>	All day	⊕ 11th Annual Solo Small Firm Conference - Indiana - Indiana ☐
<b>Fri Jun 1</b>	All day 11:00am – 12:00pm	⊕ 11th Annual Solo Small Firm Conference - Indiana - Indiana ☐ ⊕ #legalchat - twitter ☐
<b>Sat Jun 2</b>	All day	⊕ 11th Annual Solo Small Firm Conference - Indiana - Indiana ☐
<b>Wed Jun 6</b>	1:00pm – 2:00pm	⊕ Getting Email Done - LegalTypist hosted teleclass - Teleclass ☐
<b>Thu Jun 7</b>	All day	⊕ Solo Small Firm Conference - Missouri ☐
<b>Fri Jun 8</b>	All day 11:00am – 12:00pm	⊕ Solo Small Firm Conference - Missouri ☐ ⊕ #legalchat - twitter ☐
<b>Sat Jun 9</b>	All day	⊕ Solo Small Firm Conference - Missouri ☐
<b>Wed Jun 13</b>	12:30pm – 2:00pm	⊕ Lunch at The Main Event - The Main Event Plainview, NY ☐
<b>Fri Jun 15</b>	11:00am – 12:00pm	⊕ #legalchat - Moderated by LegalTypist - twitter ☑