The Legal Connection
where legal technology & people connect

February's Issue Is All About The ♥

February's theme is love.

I ♥ tech just as much as the next person – but my contribution this month is not about a tech – it's about a tech show!

February is always the annual LegalTech NY wrap up. I do ♥ to meet other legal and geeky people and see what's new in the legal tech realm and this year was no different. See my wrap up of #LTNY on page 2.

Business coach Barbara Nelson – who is definitely NOT a techie, contributed another stellar article this month – as always putting her own little spin on the theme. See page 3, for Barbara musing about taking the tech out of the love you show clients and contacts.

On page 4, Bruce M. Cameron, The Rural Lawyer, contributed an article, that literally made me LOL more than once. You HAVE to read it.

Page 5 gives us a solid tech recommendation from our Mac loving attorney, Joe Bahgat and legal practice pro Allison Shields follows with two web based techs she absolutely adores.

Next up is some practical advice on answering the phone by Ruby Receptionists own Katie Wilson.

We wrap up this issue - sadly not with Steve ODing (he was busy being – you know, an attorney!); instead we have Solosezzer Ben – I'm not an attorney – Schorr helping us understand Cable vs DSL and why we may want to double up our love of connections to the Internet if we're in business.

I couldn't let an issue about tech and love go out without a big ♥ to the tech used at LegalTypist and by our clients:

The System (powered by Sten Tel); Clio; Dictamus; RocketMatter; MyCaseInc; ProLaw; NitroPDFPro; Dropbox; SnagIt; Evernote; Outlook.

AND I can't just send out ♥ to the tech - LegalTypist would not be successful without the people – the Digital Assistants who process the day to day dictations, documents and delegations of the clients of LegalTypist.

Much ♥♥♥ to Tracy S, Operations Manager of LegalTypist – for keeping it all running as it is supposed to; to long standing Digital Assistants Susan, Elaine, Cynthia, Kerri P. and the rest of the DA gang getting the work done; and to Delilah, Pamela, and Kris for putting up with me and some of the odd-ball requests that I get outside of the scope of services offered through LegalTypist.

I wish you and yours a chocolate filled month <why limit it to one day!!?!

til next month…

LegalTech NY 2012 Wrap Up

LegalTech NY 2012 dubbed with the generic hashtag #LTNY and held at the New York Hilton around this time each year, arrived without any ice or other storms - so a bonus over last year's Ice-A-Palooza that engulfed much of the Eastern US.

This year, just as I have since 2007, I was thrilled be able to drive in to mix and mingle with other legal geeks - meeting and making new friends - to see the Exhibit Hall and what was new on the horizon in the legal tech world.

Unfortunately, Day 1 didn't start out well - a stalled Jeep in the left lane of the LIE on the way in made me miss the ONE session I really wanted to attend - Brett Burney's iLove iPads session. Luckily, I was able to catch up with him later in the day by the coffee station and again at the Kroll OnTrack sponsored happy hour where we got to talk over a beer. I cannot recommend Brett highly enough if you are a larger firm IT admin struggling with the addition of iPads to the firm's tech arsenal or you are solo who really wants to understand what it can do for your productivity. Brett's no fanboy - he just really understands this tech and how it applies to a lawyer getting work done.

The Exhibit Hall was a bit disappointing this year. :(Really not as much creativity in the exhibits as in past years - no safari rides, mimes or famous people impersonators to be seen anywhere.

Even the swag seemed less creative - with most vendors putting out a cheap bowl of candy. Of course, it got eaten - I noticed much of the time by those manning the booths! The one stand out give away this year has to be the Chuck Norris t-shirt from the minds of shift:
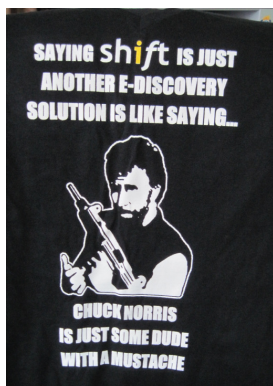
There were some new additions to the trade show floor that I was very happy to see - LitSoftware - the makers of TrialPad (for iPad). It was also very nice to see NetDocuments - the web based secure filing system built for legal which I implemented as Document Czar of and use with the Solosez listserv/firm/gang.

Over all, the feel of LegalTech NY is getting more main stream. In past years it has always felt very e-discovery tech oriented; but this year that seemed to fade a little bit. The same with the educational tracks – geared towards international ediscovery at the 1000 attorney level. While the pervasive theme is still ediscovery, I attended the ILTA sponsored educational track for "IT" and found the sessions to be chock full of just the information an IT person from a 10-100 attorney firm needs to know. The ILTA track was well attended and I plan on making them a priority in future years. Here's a snapshot of my view of the panelists from the IT session I attended entitled

6 Technologies You Should Know About

There is one event, held during LTNY, just for the solo/small firms - the dinner/tweet/meet up put together by @LisaSolomon. I consider this a not to be missed happy hour/dinner - as I so greatly enjoy connecting with the people who attend – many of them from Solosez.

Is LegalTech NY worth it? In the past I have not recommended that solo/small firms pay the high cost of attending LTNY. I still do not believe it of value for a true solo, however, firms of 10-100 are becoming better represented in the educational tracks and by the vendors – so I believe #LTNY has finally become worth the investment for managing attorneys, admins and IT staff.

Next year's LegalTech NY is January 28-30, 2013.

February = Tech + Love

Hanna gave me my writer's prompt for this month's tech+love themed column. She said I should write about how love can be expressed through technology and whether or not it makes a difference if a message of love is texted versus whispered in the ear. (She's 13, the "whispering" part is my embellishment.)

We aren't talking about official lawyer-client communication today. While it doesn't make sense to talk about romantic love here, either, let's apply the thought to how we appreciate clients. As in "show them the love". Does it make a difference if you send an email versus a card? To some extent, it depends on the recipient. I've had two clients who have said they prefer email over paper. Both are environmental lawyers. The vast majority of my clients love getting cards or notes. They feel special. They feel acknowledged. What about you?

In his excellent new book, *Everyone Communicates, Few Connect,* John C. Maxwell says:

"Connecting is the ability to identify with people and relate to them in a way that increases your influence with them."

Maxwell also says "connecting always requires energy". Sending a truly personal greeting takes energy, even if it's just signing your name and "wish you well". You need stationary on hand. You have to look up an address. It isn't nearly as instantaneous as shooting an email. Still, I do recommend it! Success in a professional services business will follow strong connections. The best technical lawyer is not always the most successful one; it's often the lawyer that can build strong relationships who builds the strongest business.

Make a point of connecting more personally and more often in 2012.

Stock up on personalized note cards and thank you cards. You don't have to wait for a birthday or holiday. (Then again- National Tortilla Chip Day is

February 24th, folks) Keep forever stamps on hand or you can even upload your logo and create unique postage stamps through the US Post Office.

Think about the specific person you want to deepen your connection with - what makes sense?

One mastermind client came up with the idea to send his client notes for things like "you did a great job in the court appearance today". Or- "I really appreciate that you always get me the information I ask for so quickly."

What if you set a target of sending out five notes a week? Five not enough? Too many? Choose whatever number makes sense for the number of contacts you're nurturing.

I've focused on notes, but look for different ways to add a personal touch. Simply adding a post-it with a personal message to a document or even an invoice can be effective. Once in a while, make a phone call when you might have used email. Be intentional about connecting with clients and referral sources. It's good business.

The number one complaint about attorneys is lack of communication. Lawyers don't return phone calls. Lawyers can't be reached. Lawyers are too arrogant to be available. Be different. Be personal. Inspire trust and loyalty.

Add a little non-tech love to your communication plan and see what happens.

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

♥ The Rural Lawyer Tech Love ♥

I must admit to being a recovering techaholic. I have yet to meet a small bit of shiny new tech that I haven't lusted after to some degree or another. Fortunately age and experience have tempered my passion (oh for those days of youth when even a mere passing glance at an IMSAI 8080 could cause my knees to go weak) for no matter how much we are devoted to these sirens of silicon, they are ephemeral mistresses, lasting for but a brief moment before the allure of a younger model draws our attention away.

Despite the indiscretions of my youth (that fleeting experimentation with a Timex Sinclair was but a passing fancy - I may have used, but I never coded), my law practice has given me a stable, healthier relationship with tech. Gone are the carefree days of tech for tech's sake; now tech must shoulder the burden of bourgeois profit; dirtying her electrons with the mundane tasks of business - being used as simple leverage, a mere augmentation of a frail biologic. Tech has fallen from the pedestal by the entrepreneur's implacable rule that investment must show a return.

Now that I am in a long term relationship with my tech, I find that myself attracted to her more mundane side - that's not to say that a shapely aluminum frame or a well turned LCD won't draw my eye (but it's a look, don't buy kind of thing). I am finding that up-time, stability, reliability, and redundancy are far sexier than an over-clocked CPU and a huge RAM cache (besides, I'm more a disk-man - there ain't nothing like a big RAID array). While I feel a twinge of regret that I've ceased courting the cutting edge, her demanding nature (always wanting that upgraded OS or those new device drivers) and constant demands on my time made her a poor business partner - oh, when she worked, boy did she work, but meeting her mercurial nature was far too draining on my time and resources. But when one relationship ends, another begins and I find myself in a lovely, stable polyamorous relationship with an fairly open desktop system with a lovely RAID, a obsessive-compulsive incremental backup system, and a laptop whose battery life and screen size more than make up for her slight weight problem.

Sure the relationship had a few teething problems during the early stages - most were due to peripheral issues. I had come into the relationship with a fairly liberal attitude towards peripherals (hey, any port in a storm), but both the desktop and laptop were far more conservative - oh, once some strict compatibility issues were met, they were very willing to plug-and-play, but there were some false starts and a couple of peripherals had to be replaced when the systems underwent a major OS change about a year into the relationship. But that is all past now and all systems have settled into a stable configuration. Oh, there has been some recent talk about inviting a smartphone or a tablet into the relationship; the tech is willing to accommodate the right device, but I am still questioning if the addition will have a suitable ROI.

My decades long relationship with tech has taught me that there are a number of rules if you want a stable, profitable relationship with tech (the first being: "never buy a computer from a manufacturer of analog wrist watches") with the key rule being that the difference between tech and toy is that you invest in tech and you buy toys. If that pretty little piece of battery draining, silicon won't make you money then it's simply a tech-toy, fine for a short term fling (if you can afford it) but it will never make it as a long term business partner.

When I look at tech now, through an entrepreneurial lawyer's eyes, I no longer define "sexy" in terms of raw performance or number of features, instead I look in terms of functional life span, costs over lifespan, time saved, money saved, and my overall ROI. It's a mercenary state of affairs where tech's attractiveness is not determined by it's distance from the cutting edge, but rather is determined by the amount of profit to be made by it's adoption.

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

I ♥ OmniFocus

OmniFocus is probably best known by people who subscribe to David Allen's **Getting Things Done** philosophy (GTD). As far as I know, it's the only third-party task management application that Allen has endorsed.

So what's so great about it? I won't bother to explain GTD; if you don't know, read the book. It's a game-changer regardless of what computer platform you use, or what you do for a living. As I see it, however, GTD has two core principles: (1) Clear your head of all the "stuff" and (2) Use contexts to be efficient. "Stuff" means remembering to pick up the dry cleaning, schedule a dentist appointment, buy flowers for secretary's day, whatever — all of those little tasks clutter up your head and keep you from focusing on whatever you're doing at any given moment. Contexts are like situational circumstances — the places you are when you do things (e.g. the grocery store, or your office), or the tools you use to do them (e.g. your computer/laptop, phone, fax machine or email device, etc.)

OmniFocus lets you empty the stuff out of your head, and stores it until you have time to organize it into manageable tasks, which you can then do in an efficient and systematic fashion at a time (or place) when it makes the most sense.

For example, you have a list of people you need to call, perhaps at different times or on different days; if you're driving and find yourself stuck in traffic, bored, or just feel like crossing things off your to-do list, you can refer to the phone context on your iPhone, and start making calls one at a time, and then check them off when each one is complete.

If you call someone and have to leave a message, you can even flag that event in OmniFocus, so that you know that you have to follow-up with that undone task. If you set it up right, OmniFocus even lets you dial the phone just by clicking in the task entry. It also lets you see when a specific call, or task is ripe or ready, by hiding it until a specified date or time.

The purpose of this column isn't to explain OmniFocus from A to Z; there are many many resources out there that do that already. If you want to find out more about it, just read the whitepaper "*OmniFocus, GTD, and You*" from David Allen's website www.davidco.com. Also check out www.AsianEfficiency.com, which is a great resource for after you've started using OmniFocus. It will help you get the most out of it. And if you really want to become an OmniFocus ninja, pick up copies of David Sparks's (@macsparky) books *Mac at Work* and *iPad at Work*, and then go check out his Mac Power Users podcast series (you can find everything from Sparks's blog at www.macsparky.com).

Just an FYI, nobody paid me a nickel to say all these great things about OmniFocus, GTD, or any of the authors/resources I've just provided. I paid full price for everything I mentioned, and they are all worth every penny, because OmniFocus has literally changed my work habits and has more-or-less changed my life. That's why I love OmniFocus, and why you should consider adding it to your tech too.

Joseph A. Bahgat counsels individuals and advises businesses on how to resolve disputes involving contracts, licensing, the Internet and intellectual property. Joe works in and out of court and uses his experience as a professional musician to help clients dealing in the entertainment and sports industries. Joe is an avid Mac user who blogs at The Sports & Entertainment Law Playbook as part of the LexBlog Network:
http://www.sportsandentertainmentlawplaybook.com/

2 Techs To Love

Snagit®

Snagit is one of my new favorite tools. It was an enormous asset in writing **LinkedIn in One Hour for Lawyers** (debuting at this year's ABATechshow at the end of March*) which I co-authored with tech guru Dennis Kennedy. SnagIt allows you to do all kinds of captures and save them as images. We used it for all of our screen captures for the book.

But Snagit not only allows you to capture images – it lets you capture text from places you normally couldn't capture text, and it will allow you to capture all of the images from a web page at once. Capture a whole window, a scrolling window, a region or your whole desktop. And you can capture video, too.

Snagit's features let you export images to the web for sharing on social media, or embed images directly in a blog post. The Snagit tools allow you to combine multiple images into one or markup your images, adding callouts, text, etc. The options are almost endless.

If you do presentations, SnagIt is an invaluable tool. But even if you don't do presentations, it's a great tool for social media, for demonstrating things to clients or for putting together exhibits or demonstrations for trials.

Although it isn't free, SnagIt does have a 30 day free trial, which is more than enough time to test it out with your first project. After that, it's only $49.95 – a bargain!

EVERNOTE®

I've had the Evernote app for a while, but hadn't used it much until recently. I always thought it was a cool app, but wasn't sure how to make it a 'go to' tool for me. Now I'm using it more and more.

Evernote lets you create notes or capture web pages, add annotations and sync across multiple devices. But for me, one of the best things about it is the offline access. I do a fair amount of traveling and I like to use that time to catch up with my reading. I often come across web pages or email newsletters that I don't have time to read when I first find them. I used to bookmark them to either read later or for reference for article ideas, blog posts, presentations, etc. Now, instead of bookmarking them in my browser, I clip them to Evernote. Then I don't need internet access to read them – I just make sure that before I leave my office, I turn on my laptop to sync the Evernote files and I'm good to go(perhaps someday soon I'll have an iPad to synch instead). I can even catch up on my reading in 'no internet' zones, like on the plane.

I've found the tagging features in Evernote make it easy to sort and find what I'm looking for, and I can set up notebooks for particular projects. I can even create shared notebooks if I want to collaborate with someone else on a project.

Even better – Evernote is free. What's not to love about that?!

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.

*Join Allison, Dennis Kennedy, Ben Schorr, Andrea Cannavina and many of the contributors to The Legal Connection Ezine at #ABATechShow. Chicago Hilton. March 29-31, 2012.

See next page for **SuperPass** information

The Legal Connection : February 2012

How to Make a Great Impression over the Phone

You love your clients and want to make them happy. Often a phone call is their first point of contact with you and remains an important way to communicate throughout your business relationship. Here are five ways you can make a great impression every time someone calls your office:

1. **Start with a great greeting.** Begin with a warm "Good Morning/Good Afternoon" or "Hello, thank you for calling." Always include your company name so that people know they've called the right number, and feel free to say your name, too, for a friendly, personal touch. Follow it all up with an offer of assistance like "How may I help you?" Remember to take your time when saying the greeting; if you repeat the same greeting all day long, it can be easy to fall into a routine of "ThankyouforcallingTheLawOfficeThisisSaraHowmayIhelpyou?" negating all of the warmth and helpfulness and making your caller feel like they're inconveniencing you. Get things off to a great start by taking your time and letting them know they have your full attention.

2. **Smile!** You wouldn't greet in-house guests with a frown; why should it be different for callers? A smile will radiate through your voice and put your callers in a better mood – *This person genuinely wants to help me!* – plus, it's scientifically proven that smiling could improve your mood!

3. **Pay attention to phrasing.** Use confident affirmatives like "certainly" or "absolutely" rather than "yeah" or "sure." It reassures your caller that you are listening and that you're taking care of them. On the other hand, try to avoid saying "I don't know" or "I can't"; if you need to say no or buy some time, offer a solution such as, "I would be happy to check on that for you. May I give you a call later today when I know the answer?"

4. **Listen for cues on titles.** If you ask, "May I ask who's calling?" and they reply with "Susan," address her by her first name. If they say, "Attorney Whittaker," go with that. When in doubt -- "Susan Whittaker" -- use "Susan" rather than "Mrs. Whittaker." You'll seem like an old friend – let's face it, people do business with people they like, and their friends would call them by their first name.

5. **Follow up calls with an email.** If you chat with a client about something particularly complicated, or you give them a piece of pertinent information that could come in handy later, go ahead and follow up your phone call with an email. A simple "It was great speaking with you earlier! The address for courthouse is 103 Main Street, on the corner of Main and First," will be a nice surprise to find in their inbox and will let them know you care.

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.

===

Meet LegalTypist CEO Andrea Cannavina and many of the contributors to The Legal Connection ezine this year at #ABATechShow. LegalTypist is putting together SuperPass groups for 2012 with special perks *besides* getting in for less than $500. Email **techshow@legaltypist.com** to learn more.

Tech According To Ben
Double Up The Love On Your Internet Connection

In this article I want to talk a bit more deeply about technologies that make your Internet connection faster and more reliable.

In most places we have two basic choices for Internet connectivity: cable modems or DSL and each of those technologies has its own strengths and weaknesses.

Cable Modem

The folks at your local cable company use cable modems to deliver your Internet service over the same wires that carry their cable TV signals. Cable modems tend to have a much greater range than DSL (wait for it, we'll get there) and in my experience are a bit more reliable. HOWEVER…when you use a cable modem you're sharing bandwidth with your entire neighborhood. If you have a cable modem at home you may have noticed that your performance may fall off a bit in the early evening when all of your neighbors come home and start streaming NetFlix across their cable modems. That's because you're all sharing bandwidth and when everybody else is on it and pulling a lot of data the pipe gets a little crowded.

DSL

The phone company's technology is called a "Digital Subscriber Line" or DSL. DSL doesn't have quite the same issues with traffic congestion when all of your neighbors start downloading episodes of Glee, but it has other issues. First off, and this is mostly a concern for business users who need to transmit large files in addition to receiving them, the upload speeds on DSL connections can be quite limited. Typically DSL has an upload speed of about 700Kilobits per second – which is often less than 1/10 the download speed.

The second issue with DSL is that its speeds are dependent upon how far you are from the provider's nearest switch. The further you are, the slower it will be. That's why on the commercials they say "Up to 20Mbps". Well, 4Mbps is "up to" 20Mbps.

So, which should you get? If your business depends upon the Internet then my answer is…both. Yes, both. Get one connection from each provider. Stay with me for a moment…

Firewalls

A firewall is something that sits between your network and the Internet and tries to keep the bad people out. Usually it's an small appliance of some sort; a device the size of a book that you plug the cable coming from the Internet into and then have another cable coming from that device to your network. If your business depends upon the Internet then I'm going to recommend that you get a firewall that supports multiple WAN (Wide Area Network, i.e. Internet) connections so that you can plug your DSL and cable modem connections into it. This firewall should support two basic concepts:

Load Balancing. The firewall will watch each connection and as you send traffic to the Internet the firewall should automatically send your traffic on whichever connection is less busy at that time.

Essentially you'll be combining the two connections. It's not quite as simple as adding the 12Mbps from thecable company to the 12Mbps from DSL to get 24Mbps but that's the right idea.

Failover. More importantly the firewall should be able to do what we call failover. That means that if either connection fails the firewall will automatically send all of your traffic out on the other connection until the failed connection is restored.

How much does all of this cost? A few hundred dollars for the firewall and a modest monthly charge for the second Internet connection. Probably quite a lot less than what it would cost your business to have slow or no Internet connectivity for hours or longer.

Ben Schorr is a legal IT guy, Microsoft MVP, author of several books to help attorneys better utilize Outlook and is a valued member of the Solosez list. Visit Ben's website and be sure to sign up for his Monday Morning Technologist.
www.rolandschorr.com

Doing a little joking around here at
LegalTypist and thought we may need a new tag line:

Best new tag line

- ○ if you got a phone, we got the rest
- ○ we work your tech or you work ours
- ○ who needs tech when you have LegalTypist
- ○ document assembly service with the brains left in
- ○ you bring the to do's, we get them ta done
- ○ Other: _____

[Vote]   View Results   Share This

Vote here: http://poll.fm/3j928

LET'S CONNECT!

Linked in ®

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

The Legal Connection
where legal technology & people connect

Feb-Mar 2012

Calendar

Tue Feb 14	1:00pm – 2:00pm	⊞ Security and Google Apps - Webinar
Wed Feb 15	11:00am – 12:00pm	⊞ Transforming Business Productivity and Collaboration with Microsoft Office 365 - Webinar
Thu Feb 16	1:00pm – 2:00pm	⊞ Ethical Issues in Online Legal Advertising & Social Media - Webinar
Fri Feb 17	11:00am – 12:00pm	⊞ #legalchat Moderated by Andrea Cannavina - twitter ✉
Fri Feb 24	11:00am – 12:00pm	⊞ #legalchat - twitter ▣
Tue Feb 28	2:00pm – 3:00pm	⊞ IT Consumerization and Google Apps - Webinar
Wed Feb 29	1:00pm – 2:00pm	⊞ Unlocking the Secrets of Social Media for Attorneys with Stephen Fairley - Webinar
Fri Mar 2	11:00am – 12:00pm 1:00pm – 1:30pm	⊞ #legalchat - twitter ▣ ⊞ DAFT Your Way To Organized - Webinar ▣
Thu Mar 8	1:00pm – 2:00pm	⊞ How to be a Great Legal Blogger - Webinar
Fri Mar 9	11:00am – 12:00pm	⊞ #legalchat - twitter ▣
Wed Mar 14	12:30pm – 1:30pm	⊞ Lunch with LegalTypist - Live ▣