

Technology eReport

The Online Supplement to GPSolo Technology & Practice Guide

Volume 1
Number 4
October 2002



HIGHLIGHTS:

-This issue focuses on practice management systems. Seth Rowland's "Stop, Look, Listen...Then Do" makes the basic case for practice management software. Wells Anderson builds on that by discussing the more advanced concept of linking practice management and document assembly software.

-Tony Vittal's "TechNotes" focuses on the evolution of computer technology and artificial intelligence.

-Jeff Allen's "MacNotes" addresses Virtual PC's slow down in Mac OS X.

-Check out Product News for hot new products.

Stop, Look, Listen...Then Do: The Argument For Practice Management

By Seth Rowland*

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When my son entered kindergarten last year, the first lesson he learned was the following: "Stop, Look, Listen ... then Do." When Mrs. Lucas rang the bell, he was to immediately "stop" what he was doing and "look" around to see where the teacher was. He was to then to "listen" to what the teacher had to say. And only then was he to "do" whatever he was supposed to do.

Robert Fulghum said that everything you need to know, you learned in kindergarten. When it comes to assessing whether you want or need a practice management solution, follow Mrs. Lucas's directions.

"Stop." Most lawyers are too busy rushing from one important matter to another to give proper attention to yet another matter. Each day only has so many hours. You need to stop before you can think. Find a solid uninterrupted hour, maybe even a whole day, when you have no client or management concerns.

"Look." If you are in business, you are currently managing your practice. This doesn't mean you manage it well or couldn't manage it better. But before you launch into a new practice management system that will turn your office upside down, "look" at how you manage your office. Evaluate both your manual and electronic processes.

Whether you work with a consultant or brazen it out on your own, you will need to know what you are currently doing. Talk to the secretaries, the paralegals, the associates and your partners. Look at your billing records by category of work. Look at how current (or not) your colleagues are in entering their time. Document the current processes. Realize that any change should build on and extend existing processes.

"Listen." You can, of course, listen to consultants. You should talk to colleagues at other law firms to understand the solutions they chose. Ask them how they implemented those solutions, not just what product they chose. Most of all, listen to your staff. Find out what they want. Find what is missing from the current system, what processes "don't make sense."

"Then Do." After you have stopped, looked, and listened, you need to act.



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This is the hardest part because it requires expenditure of time and money, with no immediate payback. Automation projects have a tendency to drag on. The longer they drag on, the more expensive they get. Once you have done your due diligence, come up with a project plan and start implementing it. The time to act is now.

Implementing a practice management solution is an investment in your business. Practice management is not a “must have” toy that you show off to potential clients, much as I show off the Alienware Area-51M laptop I am using to write this column. It is a tool that no client ever sees directly, yet affects everything that you do for them. A practice management solution insinuates itself into the way you relate to your clients and the way you practice law.

By “practice management” I mean the care and feeding of existing clients. Practice management allows you to know every last detail about your clients. Through contact profiles and related notes, tasks, events, calls, emails, and documents, you can know at a glance what to report when the client calls. You can “mine” your database to know which clients would benefit from news about a change in the tax law, which incidentally would mean more business for you when they come in to get the appropriate documents drafted to gain the benefit of the change.

By “practice management” I mean effective prospecting for new clients. Your database can store details on anyone you know or want to know. You can build marketing campaigns to approach certain groups of contacts and use the system to produce letters and e-mails, with ticklers to remind you to make follow up calls. It may even be as simple as getting the business cards you picked up at your last seminar into your system and sending a thank you note by e-mail.

By “practice management” I mean the consolidation of all information relating to your cases in a single place. Most attorneys will carefully create an accordion file when they open a case with folders for correspondence, pleadings, and other matters. More than half of the relevant information will never get into the redweld. More often, it will be inconvenient to grab the redwelds and thumb through them looking for the information you need. With a database, all the information in the redweld is a single click away. Just open the matter and click on the timeline. You can see all documents, notes, events, tasks, calls, and emails, both by category and by date.

By “practice management” I mean the production of consistent, high-quality work product. There is no reason why your regular correspondence and basic legal documents shouldn't be error free. Rather than hunting for precedents, you should standardize the forms and then automate their creation using a mix of formattable clipboards, merge templates, and document assembly tools. How many investments will let you “print money?” With document assembly you can get documents drafted in a fraction of the time it would take to word-process them, and then charge clients for the value of the services rendered, rather than the time.

By “practice management” I mean the capturing of five to ten additional billable hours per week. How many attorneys can account for every minute of their day when it comes to drawing up the time sheets? With a database that can track the time spent on calls, documents, notes, e-mails, research, as well as tasks and calendared items you will never lose another billable dollar. All items in the database can be timed and billed.

By “practice management” I mean the ability to find the document you need when you need it. All client documents are profiled by client and matter, available with a single click. Precedent documents are not sitting in some subfolder of your partner or secretary's “my

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documents” folder. If they are profiled, they can be pulled up by category on the document list. You can even do a “full-text” search of the contents to find the appropriate document.

Finally, by “practice management” I mean mobility, the ability to hit the open road and take it with you. This may be done by synchronizing your calendar and contacts with a Palm OS or PocketPC device. It may mean downloading a subset of the database to your laptop before you head off-site. It may also mean accessing the complete database over the Internet.

Effective practice management will improve your life, the way you relate to clients, and your bottom line. If the catalog above matches your vision of legal practice management, I encourage you to “Stop, Look, Listen, and then Do.”

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Linking Practice Management to Document Assembly Software

By Wells Anderson*

Linking practice management to document assembly software creates a powerful combination. Using these tools together, you and your staff can avoid busywork, find and reuse information, and improve your bottom line. Because your staff can get more done each day, you can produce more work and more fees without increasing overhead.

Making Client Information Accessible

Most offices treat document assembly as a separate program used to produce word processing documents. As you assemble a new document, you enter all kinds of client information. This information can be saved, but it is stored separately in a file used only for creating new documents. The most popular document assembly software, HotDocs® (<http://www.hotdocs.com>), calls this an Answer file. The Answer file contains valuable information, but it is not very accessible.

With the PM-DA combination, names, addresses, phone numbers, birthdates, and other client-specific information entered into your practice management system becomes available for many purposes, including document creation. There are obvious uses, such as contacting the client and developing legal advice based on the facts. Client information may also be reused to develop interest in other legal services and to serve the client in other matters. You are far better off capturing the information in your practice management system for easy access, then reusing it to generate documents.

Keep Information Up To Date

Integrated systems help you keep information up-to-date. Enter your information in a practice management system where you and your staff can use it in many different ways. Because you are using it, you and your staff will update changed addresses, phone numbers, e-mail addresses, and other client information. After one person corrects information, it is immediately available and accurate for everyone in the office.

Linking PM and DA systems helps avoid problems from reusing out-of-date client information. The PM system has the latest client information and can pass that information directly into documents you create automatically via document assembly.

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Managing Document Overload

Better practice management software packages go beyond storing client information and linking it to document assembly software. Now they aid law offices in managing the rapidly growing volume of documents needed in the practice of law. For example, Time Matters (<http://www.timematters.com>), a leading practice management product, can automatically create Client/Matter folder structures for storing documents. It links with HotDocs, Microsoft Word, and WordPerfect to create and save documents. At the same time that a document is generated using information from the practice management system, it can be saved and linked to the corresponding client and matter.

If your office organizes documents in a systematic way, everyone will benefit. You will retrieve and reuse your work product more easily. You will have multiple ways to find your information and documents, including full-text search and retrieval.

An Example: Creating Documents from Time Matters Software

Let's see how this actually works. Time Matters offers three ways to create documents and information in Time Matters client and matter records can also be merged into HotDocs templates, offering power and flexibility in handling document variations:

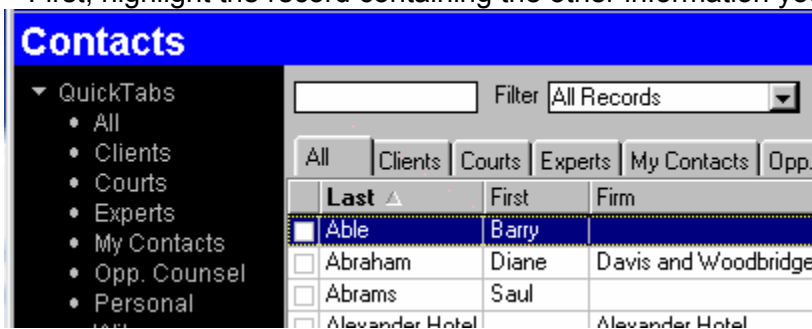
(1) The simplest method does not require the creation of a full library of merge forms. Rather, you use the Windows clipboard to insert both boilerplate text and client information from Time Matters into any document using Copy and Paste functions.

(2) Merge templates merge client and matter data directly into the firm's master forms using the Mail Merge features available in MS Word and WordPerfect.

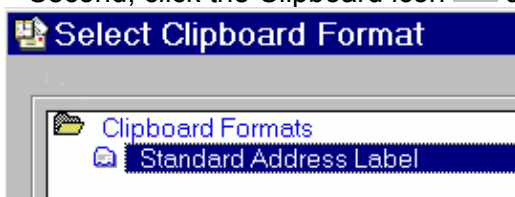
(1) Merging a Document - Simple

The Time Matters Formattable Clipboard handles tasks ranging from addressing a letter to creating a durable power of attorney incorporating a client's name, address, primary, and secondary agents. Here is how to use it:

First, highlight the record containing the other information you need:

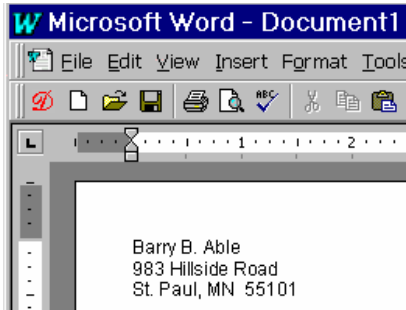


Second, click the Clipboard icon  and pick the Format you want from the list:



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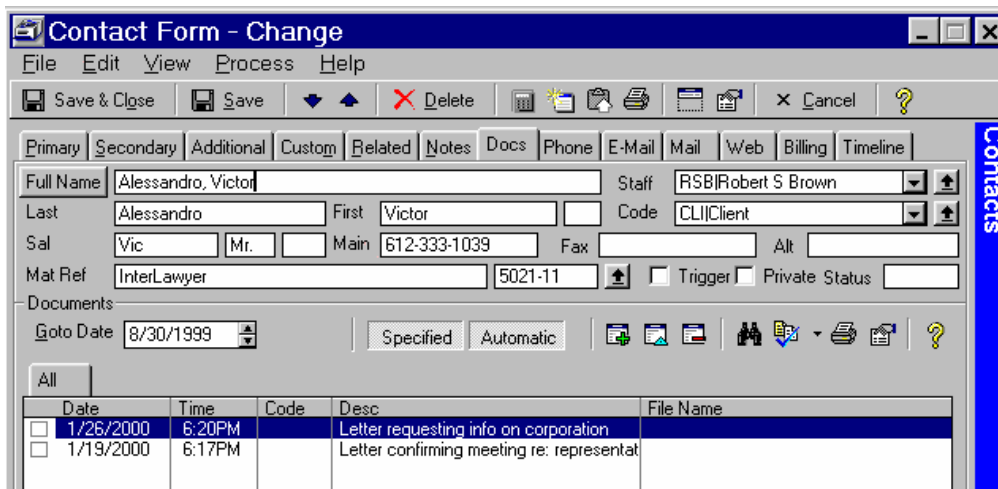
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The text you need appears in the Windows clipboard, ready for you to paste into a word processor document, an e-mail message, or anywhere else you can paste text.

(2) Merging a Document - Powerful

For special indenting, tables, or advanced features, use a Merge Template. First, open the record for the client and click the Docs tab. Entries in the white fields below hold information available for new documents.

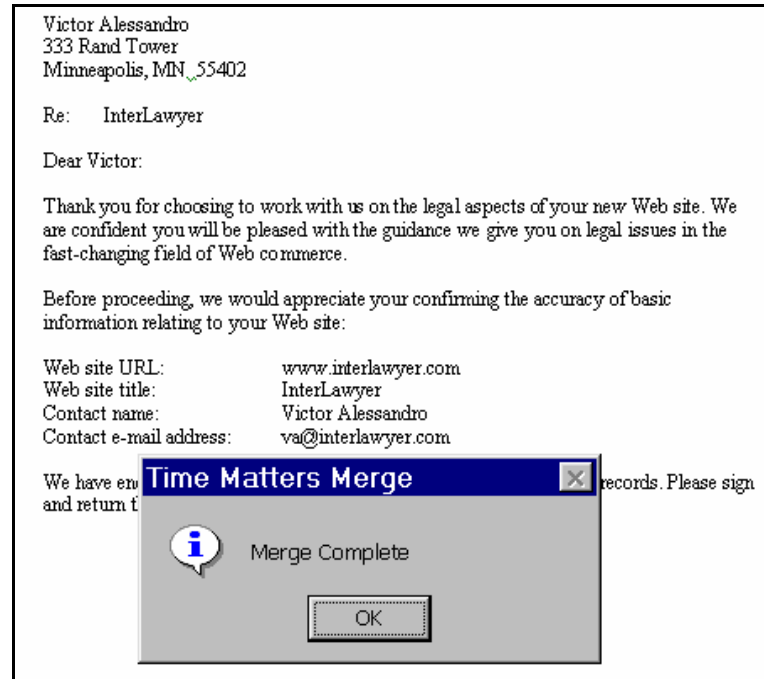


Click the New Document button  to bring up the equivalent of a 3x5 card profiling the new document. Information is already automatically recorded.

Click the Merge button  to begin creating the document. Choose a document template and click the next Merge button. Modify the suggested file name if you wish, then click OK.

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Your new document appears in your word processor under the Merge Complete message. The document contains boilerplate text and variable information from client and matter records. Click OK and proceed to edit the document in your word processor.

Conclusion

Too often, law offices adopt new technologies in piecemeal fashion, missing opportunities for synergies. Though the prospect of implementing two new technologies may seem daunting, don't miss the opportunities. Document assembly and practice management can work very closely together. With a little planning, you can get started with these two systems, then progress incrementally to get the most out of them.

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product news & views

InkLink!**

Seiko's InkLink™ handwriting system is a new product that supports Palm, Pocket PC and the Windows Operating System. It transforms handwritten notes and drawings into an electronic format, allowing users to transfer handwritten notes from paper to the personal computing system of their choice! This pocket sized digital device comes packaged in a sleek carrying case, measures 7.6"(L) x 2.9" (W) x1.4 (H) and weighs only 4.75 ounces. All necessary InkLink items store in the case: the electronic ballpoint pen, the data clip and IrDA transceiver. Attach the IrDA clip over your PDA's Infrared port, connect the mini USB plug and the InkLink Data Clip, fasten the Data Clip to the edge of any piece of paper or tablet and you are ready to go. Write on the pad with the pen and each pen stroke is captured by Seiko's InkNote Manager Software and immediately transferred to your PDA. HotSync to capture the notes to a desktop or laptop. You can also write and transcribe directly to your computer, with the included USB cable, giving you the ability to write and/or draw on your pad and have it show up instantaneously on your computer! InkNote Manager allows you to edit, cut, copy, paste, group/ungroup, undo/redo draw straight lines and even write or highlight in SEVEN different colors! You can export files in .bmp, .png, and .jpg formats to other applications. The InkLink, from Seiko Instruments, Inc., <http://www.seikosmart.com>, has a street price of \$99.95. - **Reviewed by Alan Pearlman*.**

TableTote**

Attorneys who have to go on the road and work from hotels or remote locations often suffer from "tableitis." It's that dreaded malady where the height of the hotel desk forces us to stand up to use a portable computer because the work surface is just too high. As a cure for this problem I've taken to carrying a small portable table. The Table Tote from www.pctabletote.com (1-877-31TABLE) costs \$49 and stores in a package that is just about the size of a 14" laptop computer. It weighs about two pounds. Slide the box open, take out and twist-in the four telescoping aluminum legs, and go to work. Slide the bottom of the container along a ridge on the top of the table and you expand the work surface. The legs adjust from 13" to 30" inches, so that you can make the table fit you. They've covered the details and even included a copy clip that fastens to the top of the Table Tote, providing two alligator clips to hold your paper. It's quite durable and fits easily into a large computer bag or backpack. If you carry a projector, it also works great as a projector stand! -**Reviewed by Bruce Dornier.***

Cordless Presenter**

Our friends at Logitech (<http://www.logitech.com>), best known for their well-designed and feature rich keyboards and mice, have brought their wireless technology to a new device, the Cordless Presenter. Logitech designed its presenter so that it fits comfortably in your hand, small enough to feel right, big enough to not easily get lost. The Presenter combines the traditional clicker for slide show presentations with a fully functional optical mouse (two button for Windows and single button for Mac) and a laser pointer. Powered by AA batteries and using Bluetooth, the wireless technology works reliably through an approximately 30-foot range. The Bluetooth receiver plugs into the computer's USB port. The Presenter supports both the Macintosh and Windows platforms with true plug-and-play simplicity and ease of use. The Cordless Presenter package lists for \$199 and includes the Presenter, the Bluetooth receiver, a carrying case, AND a five-year warranty. -**Reviewed by Jeffrey Allen.***

Smartdisk Firelite 30**

An 11 oz. portable hard drive - it's got a Firewire connector, which makes it really speedy. A magnesium case keeps it light and sturdy. It took me about 50 minutes to copy a 10 Gigabyte file - that translates to about 26 Mb per second by my calculations - not bad for a real-world transfer of mostly smaller word processing files, e-mail attachments, etc. The Firelite has a street price of about \$230. Information and pictures are available at <http://www.smartdisk.com>. -

Reviewed by Ross Kodner*.

Fossil Wrist PDA**

Fossil's Wrist PDA tells time, includes an alarm, and holds 190Kb of contacts, calendar, memos and a to-do list. You cannot modify data with the wrist PDA, but it easily synchs through its infrared port to Palm and Pocket PC handhelds. The wrist PDA lists for \$149, but I have recently seen it advertised for \$77. It's big and clunky looking. You would not want to wear it to a formal event, but it works if you want to have contact and calendar information with you while knocking around on a weekend. You navigate with a joy stick and two buttons. I don't think that I would buy one for myself (well, maybe for \$77); but if someone gave me one as a gift, I would use it. Pictures at <http://www.fossil.com>. -

Reviewed by Jeffrey Allen*.

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***Alan Pearlman** (pearlman@theelectronicleawyer.com) practices family and criminal law in Illinois. An active member of the ABA GPSSF Section, he has been a member of the Editorial Board of the Technology & Practice Guide. He also works as a technology consultant, often writes for lawyers, and regularly speaks at continuing education courses for attorneys.

***Jeffrey Allen** (jallenlawtek@aol.com) has a general practice in Oakland, California. His firm, Graves & Allen, emphasizes real estate and business transactions and litigation. A frequent speaker and author on technology topics, he is the Special Issue Editor of the GPSolo Technology & Practice Guide and Editor-In-Chief of the Technology eReport.

***Ross Kodner** (rkodner@microlaw.com) is a "recovering lawyer" who founded Milwaukee's MicroLaw, Inc. a legal technology consultancy and systems integrator. Ross served for four years as the Chair of the ABA Law Practice Management Section's Computer & Technology Division. He was a member of the ABA TECHSHOW Executive Board and is a member of the Technology & Practice Guide Editorial Board.

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Trends In Technology

By J. Anthony Vittal*

In the last issue, my column dealt with the need for better human factors engineering as the size of our devices continues to shrink while becoming more powerful. Since then, I have learned about the ultimate in chip size reduction. Scientists have developed chip substrata in which the atoms line up neatly in rows. The beam from a tunneling electron microscope is used to displace atoms from their rows, one atom at a time. Presto! We now can envision a chip in which the binary on-off state is represented by the presence or absence of a single atom at a single site on the chip. While that may be something we will not see in our lifetimes, it is on the horizon.

Earlier this month, Gartner analysts presented a series of predictions about the direction and consequences of technological developments expected in the nearer term – by the end of the decade. These projections contemplate that, by 2008, the typical desktop computer will have 4 to 8 CPUs running concurrently at a 40 gigahertz clock speed (about 16 times faster than we now have), interfacing with anywhere from 4 to 12 gigabytes of RAM (rather than the currently common 256 megabytes to a gigabyte), 1.5 terabytes of in-the-box storage, and the ability to interface with a 100 Gbit network (compared to today's 10/100 megabit networks). They predict that by 2011, processors will run at 150 GHz clock speeds, and have 6 terabytes of in-the-box storage. These units will have sufficient storage capacity, computing power, and speed to permit artificial intelligence to develop and function in practical ways.

Whether or not a language resides in the computer's database, the computer can interact with any client, speaking any language. The computer will be able to reach out into the global network, find the relevant database, download it at 100 Gbit speed, and interact with the client, all in probably less time than it takes to describe the scenario. Put that computer in a courtroom and let it translate accurately for any witness, regardless of the witness' native language. Suddenly, everyone has access to justice, unhampered by linguistic barriers. The same computer, with its enhanced processing and data storage capabilities, could deliver solutions to many of the legal problems of the poor and middle class that currently are unaddressed because of cost and inaccessibility. Extend the capability to the third world and watch the barriers between the haves and have-nots begin to crumble.

Increased network capacity to handle the hardware's increased capabilities will be a key to making this work. After all, what use is a Ferrari if you are in gridlocked traffic on every thoroughfare? If cheap and plentiful bandwidth becomes universally available, overcoming the barriers of the "last mile" – security, quality of service, and grid economics – we likely will see a move toward more centralized network services and a true revolution in the way we handle, process, and present information.

J. Anthony Vittal (tony.vittal@abanet.org) is Partner in Finestone, Richter & Vittal in Los Angeles, California. A member of the ABA Standing Committee on Technology and Information Systems, he frequently speaks and writes on legal technology topics.

Virtual Slowdown

By Jeffrey Allen*

Attorneys working on the Macintosh platform have, for some time, relied on Virtual PC ("VPC") from Connectix (<http://www.connectix.com>) to enable them to run Windows-based software on their Macs. Virtual PC has worked reliably and quickly, emulating a fully functional Windows PC. VPC ran just about any of the legal software that required the Windows operating system. The VPC virtual computer ran the software quite well and competently when compared with most PCs running Windows. All worked well in the Macintosh VPC world through version 5 of VPC and version 9.2.2 of the Mac OS (now Mac Classic OS).

In OS X, Apple offered an extremely stable and feature-rich operating system that far surpassed anything it had ever offered before. But OS X and VPC don't appear to play well together. The MacLaw listserv has had many posts about VPC running significantly slower under OS X than in the Mac Classic OS.

Hardware Issues: VPC creates two hardware issues. First, some programs require an L3 cache to work well. VPC is one of the programs that needs an L3 cache to work properly and efficiently. As it turns out, some Macs have an L3 cache, others do not. According to the information provided by Connectix, iBooks and iMacs have never come with an L3 cache. The Titanium G4 laptop does. Most of the newer Powermac desktops and some earlier Powerbooks also have an L3 cache. If your computer has an L3 cache, VPC will run much better and faster than if it does not. If you want to use VPC and are looking for a new computer, be sure it has an L3 cache. If you have a Mac now and want to know if it has an L3 cache, look up the specifications for your computer on Apple's web site or simply run the Apple System Profiler. The second hardware issue is RAM. VPC requires real RAM (not virtual memory) to run. If you have 256 MB of Ram in your Mac and allocate 128 MB to VPC, when you are running VPC, your Mac will have control of 128 MB and VPC will use the other 128 for the virtual computer it creates. Newer iterations of Windows require more RAM than older iterations. Generally, more RAM means a faster running computer. If you want to run VPC with a newer version of Windows (XP or 2000), consider taking your Mac to at least 768 MB of RAM and allocating 256 MB to the VPC.

Software Issues: Windows XP runs much more slowly in OS X than in earlier versions of Windows. You may be better off running Windows 2000 or even 98 SE if you use VPC with OS X. Both Windows 2000 and Windows 98 SE run faster than Windows XP in VPC under OS X. If you want to run XP, Connectix suggests that you turn off some of the features that have the biggest overhead, such as System Restore, in order to allow the system to run faster. Another (but less appealing) option is to reboot your computer into System 9.2.2 (or another iteration of the Mac Classic OS) and run VPC from that configuration.

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section notes

RETHINK, RENEW, RETOOL: GPSSF 2002 FALL MEETING

The General Practice, Solo, and Small Firm Section's 2002 fall meeting in San Diego, California was a huge success by any standards. Outstanding weather, interesting people, useful CLE, good meetings, good food, and a good time had by all (or at least all that we know about). If you missed it, too bad. **DON'T MISS THE NEXT MEETING!**

FUTURE GPSSF SECTION MEETINGS

2003 Midyear Meeting: February 5-11, 2003. Seattle, Washington

2003 Spring Meeting: May 8-11, 2003. Baltimore Marriott Inner Harbor, Baltimore Maryland

2003 ABA Annual Meeting: August 7-10, 2003. San Francisco, California.

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