

Lessen the Load: Five Ways to Use Evernote to Manage Data Overload in Your Law Practice

Attorneys these days are bombarded from every direction, many times with competing demands from clients, colleagues, staff, and family. If you don't have a way to manage all of it, your world becomes utter chaos. Research suggests that when your environment is in a state of disarray, your attention is drawn away from what you need to focus on and adds to stress by creating the appearance that your work is never done. What's more is that chaos can lead to malpractice or an ethics violation.

Chaos results not only from external obligations, but also from internal pressure. The average person has approximately 70,000 thoughts per day. That's 49 thoughts per minute. No wonder research shows that we spend nearly half of our waking hours thinking about something other than what we are currently doing. Suffice to say, lawyers have a lot of stuff (both internal and external) to keep stored, organized, and accessible when needed.

To avoid chaos and the parade of horrors that follows, you need to figure out what to do with all that stuff? Is it sprinkled throughout Word documents saved somewhere on your hard drive? Is handwritten on notepads piling on top of your desk? Is it overloading your brain? Or, is it neatly tucked away into a central repository of information that you can access wherever and whenever you need it? If it's not already the latter, then keep reading . . .

What is Evernote and How Do I Get It?

Evernote is that memory aid and organizational tool for all your data. In the words of Evernote's co-founder, Phil Libin, Evernote is "Your brain offloaded to a server. It's Google for the Web of you life. It's a spotlight on dark matter of your universe. It's a tool for converting your smartphone from a time killer to a time saver." More precisely, Evernote allows you to collect, organize, and access data; save and store web articles and e-mails; draft content and take notes; collaborate with others; annotate PDFs; and much much more. Rather than spend hours searching for those client notes you saved on your computer or mobile device or a to-do list that you left the other day somewhere on your desk, make Evernote your single and central repository for information. By

making it fast and easy to get information into Evernote as well as providing sophisticated yet intuitive search functionality, Evernote gives you access to all your important data right at your fingertips. Moreover, using Evernote's notebooks and tags keeps all your data organized and easy to maintain.

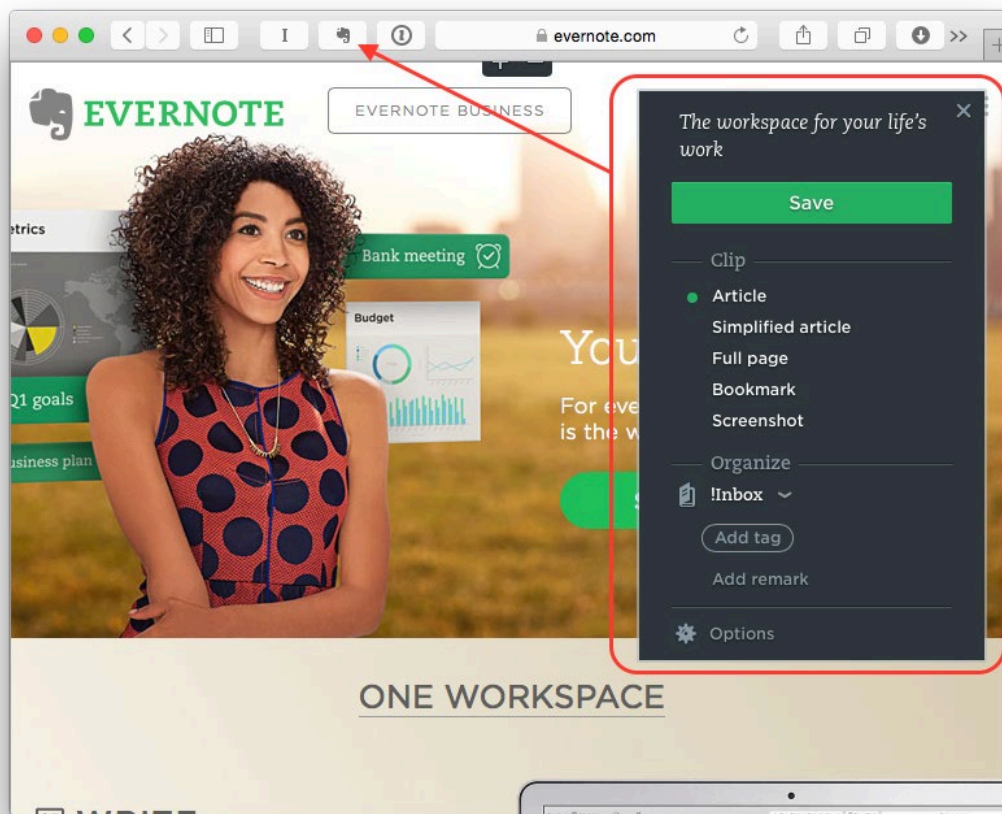
You can sign up for a free Evernote account at www.evernote.com. You can access Evernote through your web browser and you can download it to your desktop and mobile device. Evernote also makes apps for wearables, including the Apple Watch and Android Wear.

Now that I've Got It, How Do I Use It in My Law Practice?

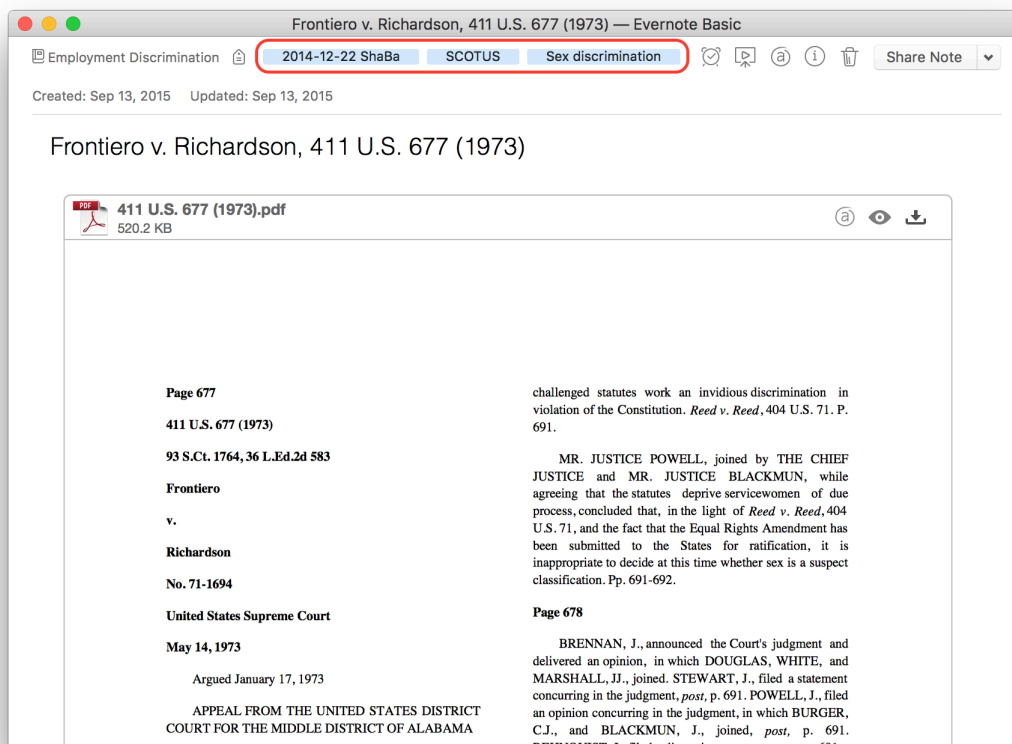
Time and time again, I talk to attorneys who say they have either heard of or have even taken the step to download Evernote but don't know what to do with it. They know it could be helpful, but just don't know where to start. I'm going to help you out by suggesting five ways in which you can start using Evernote in your law practice today.

1. Saving and Organizing Legal Research

Evernote owes its popularity much in part to its web clipper tool. At least when Evernote was first developed, the web clipper was an unrivaled tool. Most attorneys who use Evernote in their law practices use the web clipper to save and organize their legal research. With the web clipper, you can save articles, text, and images from the web directly into Evernote. Download the web clipper browser extension from <https://evernote.com/webclipper> for Chrome, Safari, Internet Explorer 7+, Firefox, Opera, and mobile platforms. To save any web page or article from the Internet, simply click on the extension in your browser and give the clip a name, select the format for saving, select which notebook to save it to, and assign it a tag for further organization (if desired). You can do the same on the go from your mobile device.

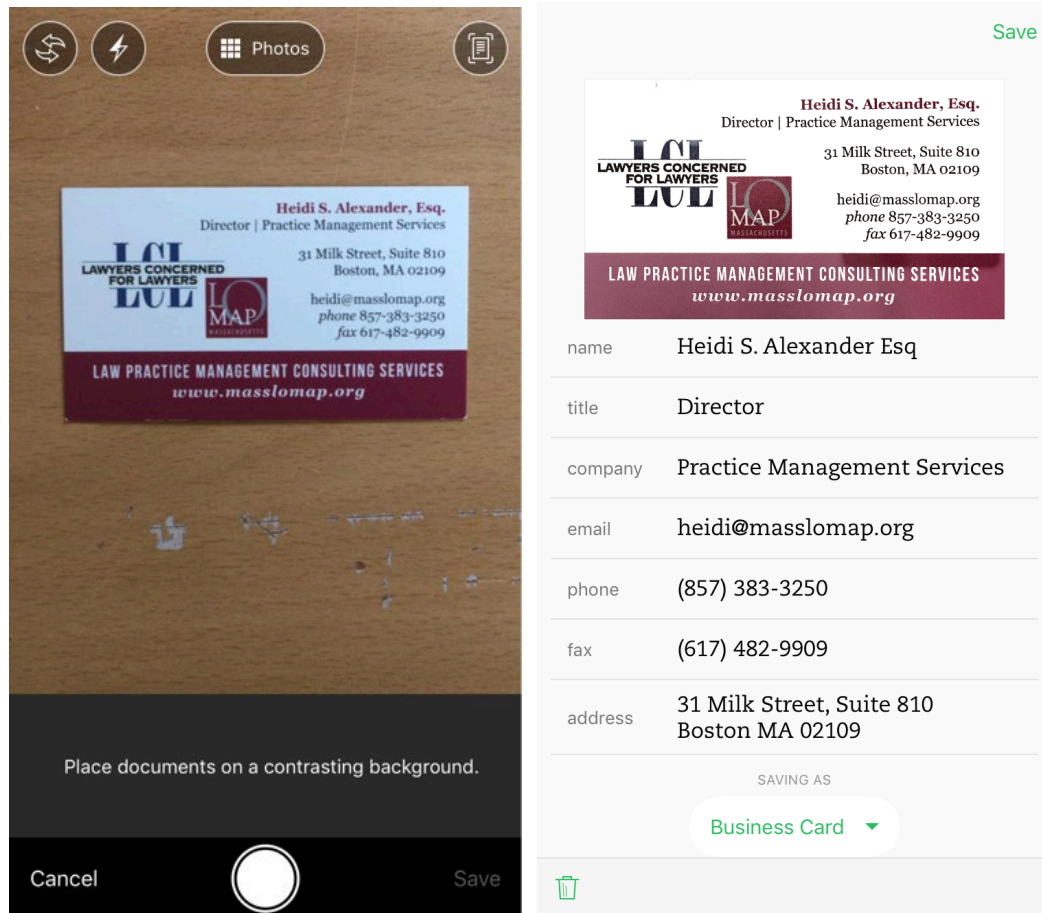


Now, imagine collecting and organizing your legal research this way rather than printing case after case for each matter you work on. You can organize your research into topical notebooks, such as Employment Discrimination, Landlord Tenant, Search and Seizure, etc. Then, when you save individual research files, such as case law, you can assign it to the proper topical notebook and tag it with identifiers such as the matter(s) it references, its case proposition and disposition, fact pattern, and jurisdiction. The next time you need a SCOTUS case on sex discrimination, you can use Evernote search terms to retrieve it. No more wasting time searching through stacks of printed case law for that one case proposition you need or reinventing the wheel by doing sophisticated searches in Westlaw or Lexis to locate something you've previously found.



2. Collecting Business Cards

While much of the data we now collect is electronic, physical business cards have yet to go out of style. The question is: What do you do with all those business cards you brought home from last night's networking event? Do leave them on your desk to inevitably be trashed or put them in a box in perpetuity never to be referenced again? Instead, upload them immediately to an electronic database. Evernote can do this for you with its business card tool. By snapping a photo of a business card using the Evernote app from your mobile device, all the relevant information is immediately collected and imported into your Evernote account, as well as other contact databases such Outlook, iCloud, and Google. You can also use Evernote's one-click LinkedIn feature to find your business card contact in LinkedIn and request a connection.



3. Save and Search for Meeting Notes

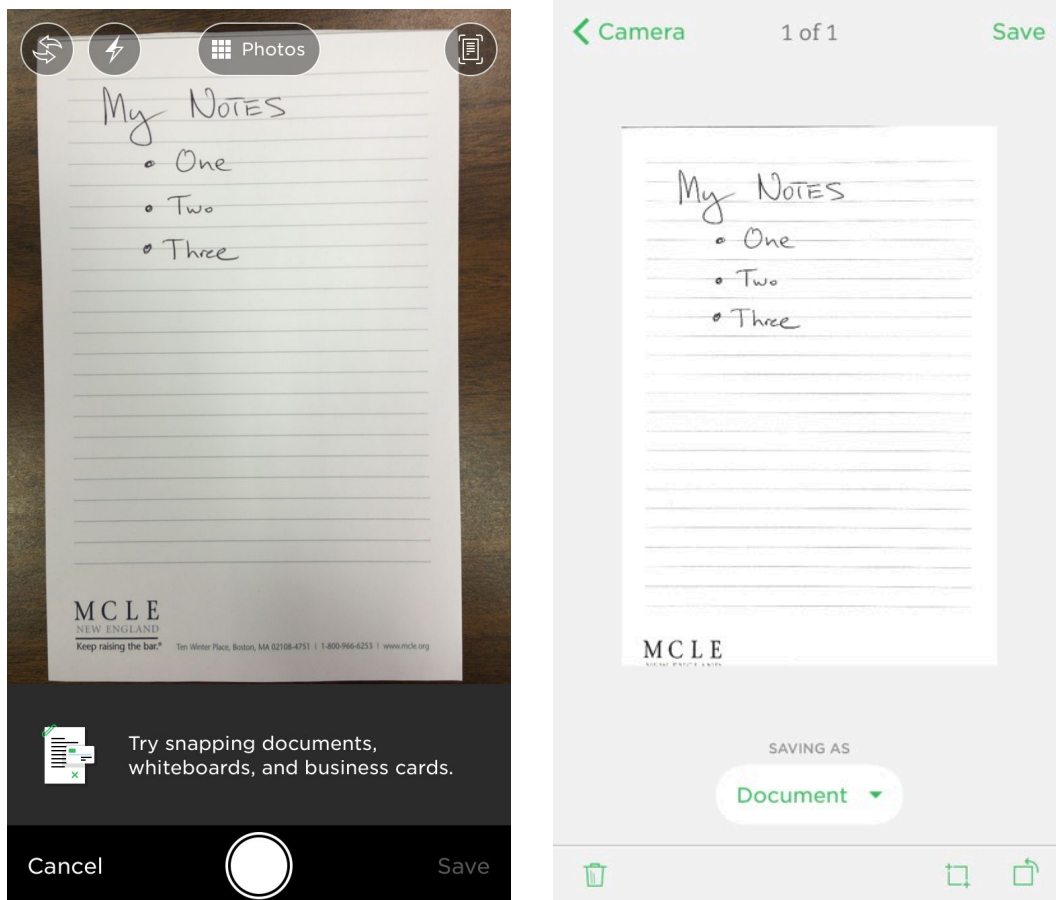
Evernote is an excellent tool for quickly taking, saving, and searching for meeting notes. Start a note with a click of a button from your computer or mobile device. Evernote automatically saves the note and syncs it to all your devices when you are connected to the Internet.

You can also save handwritten notes as searchable PDFs by using Evernote's built-in mobile photo tool to snap a picture of your handwritten notes for direct upload to your Evernote account. You can also scan multipage notes with Evernote's Scannable app or with a physical scanner. Some scanners will allow you to scan directly to Evernote (i.e. Fujitsu ScanSnap) while others might require you to first scan to your computer and then drag and drop the file into Evernote.

With Evernote's built-in optical character recognition, allowing you to find text (typewritten or handwritten), nearly everything in Evernote is searchable, making it difficult to lose track of

information you've saved.

Once you've saved your notes to your account, you can share them with others (both Evernote users and non-users) in a variety of ways. First, you can share a static note by sending it via e-mail directly from your Evernote account. Second, you can share a unique web link that will reflect any changes you make to the note in real time. Third, you can share your note via the Evernote Work Chat feature to collaborate with other Evernote users.



4. Clear Your E-mail Inbox with E-mail Forwarding

You can save e-mails into Evernote by forwarding e-mails to your Evernote account using a unique Evernote e-mail address (for premium users only) or by using the free Evernote web clipper with Gmail or free Evernote add-on for Microsoft Outlook.

When forwarding e-mails to your Evernote account, you can use the subject line of the e-mail to

give the note a title, specify the notebook, add a tag, and even create a reminder. For example, let's say you want to save an e-mail with information about a response to a motion that you need to file by a certain date. By adding the following e-mail subject line to the e-mail forward:

Response to Motion !2017/01/15 @Case File XYZ #response #state court



you'll have saved a note entitled "Response to Motion" with a reminder for January 17, 2016 in the notebook "Case File XYZ" with tags "response" and "state court". Within a moment you will have cleared that e-mail from your inbox and saved the information in your Evernote notebook to return to when you are notified via Evernote's reminder feature.

5. Keeping Important Office Data

Whether you run your own practice or work for someone else, you have important administrative data that you need to keep track of. This might include general office and systems information as well as CLE certificates, travel itineraries and receipts, and frequently used forms and templates. By emailing, saving, scanning, attaching, or clipping information to Evernote, you'll keep it well-organized and easily accessible, as well as have the ability to share it with others.

To allay concerns over storing highly sensitive data, such as financial information, Evernote provides client-side encryption for an extra layer of security on top of its own encryption at-rest and in-transit. This enables you to encrypt selected text within individual notes. Only you hold the encryption key.

▼ (W) Firm Administration	
01 Office and Systems Info	15
02 Policies and Procedures	10
03 Financial Management	6
04 Forms and Templates	6
05 CLE	4
06 Meetings	6
07 Travel	3

01 Office and Systems Info ▼  	
Title	
Adobe Acrobat Software License	
Bank Account Info	
Bookkeeper and Accountant Info	
Business Plan	
Data Backup Information	
Fed Ex and UPS Account Information	
IT Support Information	
Landlord and Lease Info	
Malpractice Insurance Carrier	
Microsoft Office Software License	
Office Phone, Fax, and Address	
Router Information	
Social Media Access Information	
VOIP Telephone System Info	
Website and Hosting Information	

Get Organized and Boost Focus by Giving Evernote a Try

Jumpstart your Evernote use by starting with the five aforementioned uses. Once you get going, you'll be well on your way to a clearer and more focused space and mind. That means more time advocating for clients, billing and collecting more, and maybe even taking a break! Now, isn't that a lovely thought?

For more on how to use Evernote in your law practice, order a copy of my book *Evernote as a Law Practice Tool*, an ABA LP publication. Receive a DISCOUNT using DISCOUNT CODE.

By Heidi S. Alexander, Esq.

Heidi S. Alexander, Esq. is the Director of Lawyers Concerned for Lawyers' Practice Management Services, known as the Massachusetts Law Office Management Assistance Program (LOMAP). LOMAP provides free and confidential practice management assistance, guidance in implementing new law office technologies, and methods to attain healthy and sustainable practices. She is t

he author of Evernote as a Law Practice Tool, a member of the ABA TECHSHOW Planning Board, and the architect behind the ABA's Women of Legal Technology initiative that celebrates and encourages women in legal technology.

Alan R. Nye
Robinson, Kriger & McCallum
12 Portland Pier
Portland, Maine 04101

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Evernote as a Law Practice Tool

By Heidi Alexander

American Bar Association

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It seems too simplistic to just describe Evernote as a practice management tool; when you use it routinely, it's just so much more. Once you get in the habit of referring to it and digging into all that it can do, it seems like your productivity soars. And for me, it helps keep everything organized.

How to describe it?

Evernote has been described by Phil Libin (co-founder and former CEO of Evernote) this way:

It's your brain offloaded to a server. It's Google for the Web of your life. It's a spotlight on the dark matter of your universe. It's a tool for converting your smartphone from a time killer to a time saver.

The author, Heidi Alexander, agrees with Libin's description and succinctly describes Evernote as "a memory aid for just about everything we do." She goes on to write:

Say goodbye to hours spent searching for those meeting notes you saved somewhere on your computer or mobile device, or that to-do list you think you put in your briefcase, and say hello to Evernote, the single program that lets you access important data with the click of a button and save important information wherever and whenever you need it.

Alexander goes on to detail that Evernote provides a way for you to readily offload, organize and access information that you don't need right away but will certainly want to refer back to at a later time. In essence, you get it out of your way and put it where you can find it again in seconds when you need it. Once you understand the concept and how to use the software, Alexander shows you specifically how lawyers can use it.

And the great thing about Evernote is that you just need to go to www.evernote.com to sign up for a free account. This is all you need to decide if Evernote is something right for you. If

you find the program valuable, there are various service levels – Plus, Premium, and Evernote Business. The main reason to upgrade is often one of storage, as there is monthly a 60 MB limit on storage for a Basic (free) account. The Plus account is just \$34.99 per year, and it gets you 1GB per month. There are other differences in addition to just storage capacity, and they are all laid out in a helpful Appendix and a referenced Evernote Help & Learning article.

After going over the core features and both explaining and showing how to effectively use Evernote, the book shows by description, power user tips, and screen shots how to use Evernote in specialized law practice uses – firm administration, case management, legal research, marketing and productivity and time management.

Evernote can be accessed through any web browser, and it can be downloaded to Android, Apple, Blackberry and Windows desktops and mobile devices. Evernote's user interface is built to complement the respective operating systems, and Anderson does a good job of showing competing instructions with screenshots from both Windows PC and Mac desktops. There is a separate chapter dealing specifically with smartphones, tablets and even wearables.

There is also an entire chapter on Evernote security. Since this is a cloud based service, ethical and statutory obligations come to mind, and the author doesn't shy away from these questions. With all the data breaches that routinely occur, including those at respected law firms, this is a must read chapter.

Finally, if that isn't enough, there is a final chapter filled with real-life examples by nine lawyers on how they use Evernote in their law practices. These examples are helpful to see the wide variety of ways that Evernote enhances the law practices of seasoned legal professionals.

So if you're looking for a way to be more productive by gaining instant access to all that information you come across and store every day, Evernote is for you and Evernote as a Law Practice Tool with help you learn how to best use this software for your law practice.

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Alan R. Nye is an attorney at Robinson, Kriger & McCallum in Portland and practices in the areas of business law, real estate and family matters. He has written and spoken on numerous legal topics. His book reviews and articles have been published in the Maine Bar Journal, the Portland Press Herald and other local and national publications. He can be reached at anye@rkmlegal.com.

EVERNOTE

AS A LAW PRACTICE TOOL



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Heidi Alexander

Book Feature: Evernote® as a Law Practice Tool

Today's law practice requires you to be über efficient with your time. But, how is that possible when you've got a slew of never-ending moving pieces—administration, marketing, finance, case management, legal research, and more? You need a central repository for storing and using information that you need on a daily basis. Evernote® is one solution. Evernote® provides a way to collect, organize, and access data; save and store web articles and e-mails; draft content and take notes; collaborate with others; annotate PDFs; and much, much more.

Evernote® is a free, cloud-based service with premium options. You can access Evernote® through your web browser and you can download it to your desktop and mobile device. Evernote® also makes apps for wearables, including the Apple Watch and Android Wear. Because it is a cloud-based app, all your stored data can be synced and thus accessed on the device of your choice.

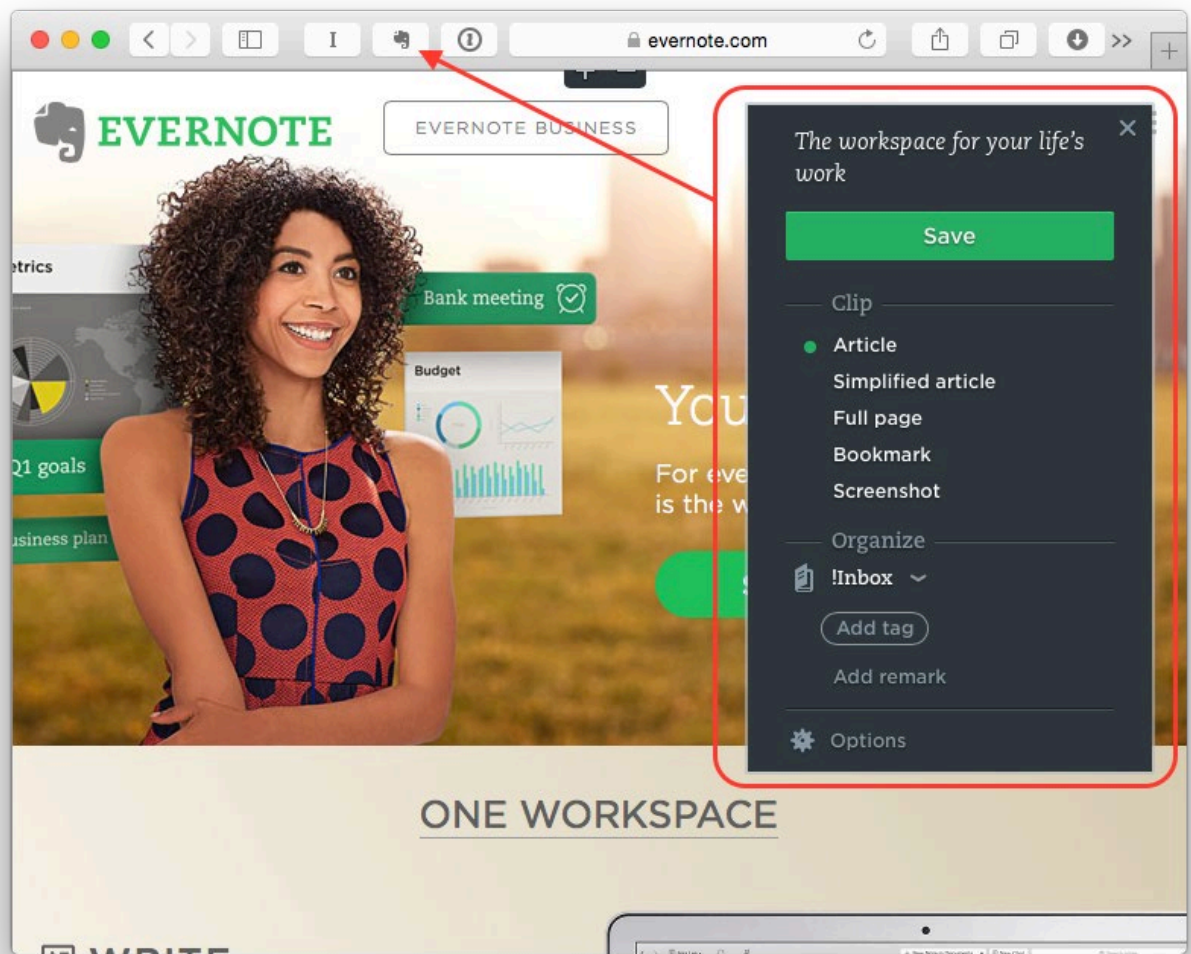
Attorneys can use Evernote® in a plethora of ways. Evernote® might contain your legal research files, firm administration and management data, e-mail archive collection, marketing plans, case and matter information, documents, and tasks. There is no right or wrong way to use it, and indeed the attorneys I know who use Evernote® each tailor it to their own practices.

Evernote® as a Law Practice Tool, my new book published by the ABA Law Practice Division, delves into how lawyers can use Evernote® effectively in their law practices, including instructions for new users on essential features and tips and tricks power users to get the most out of Evernote®.

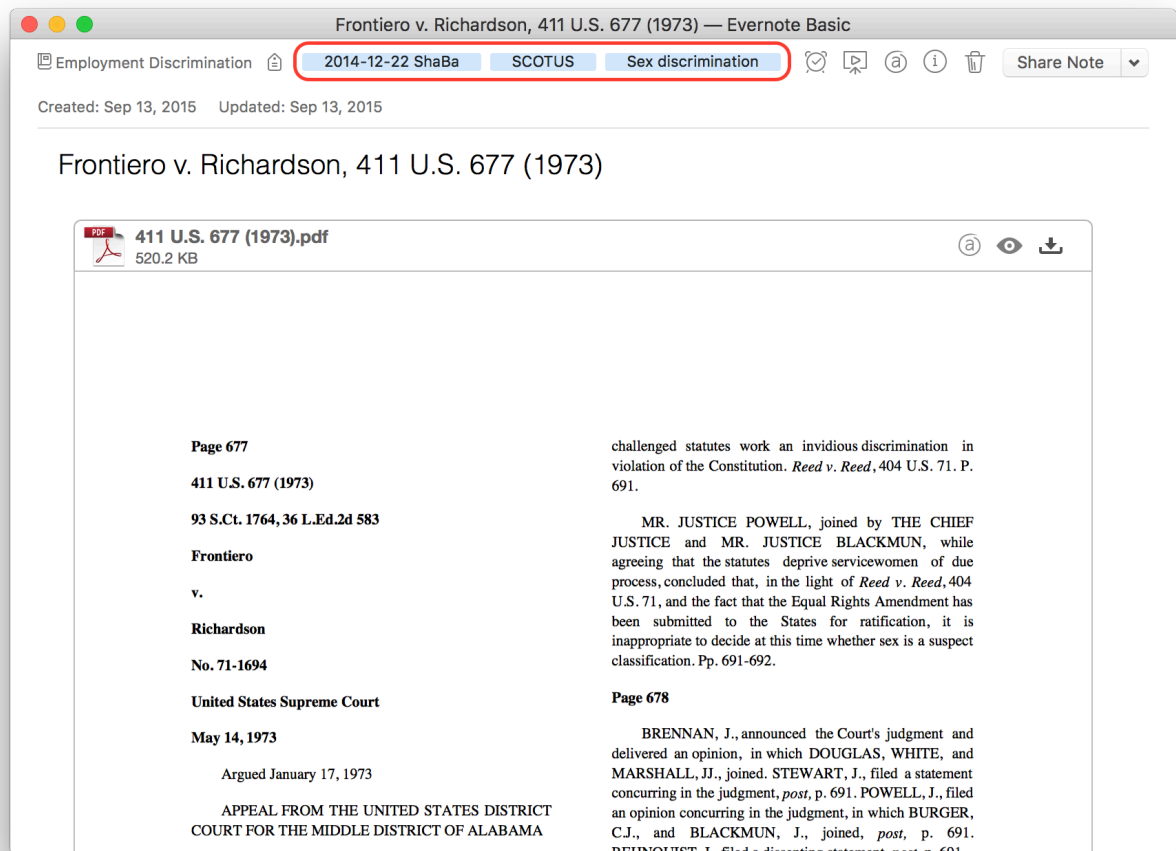
Below I've shared a few of my favorite Evernote® features and examples of how to use them in your law practice, which I discuss in much greater detail in my book.

Create a Searchable Legal Research Repository

Most attorneys I know who use Evernote® in their law practices use Evernote's® web clipper to save and organize their legal research. With the web clipper, you can save articles, text, and images from the web directly into Evernote®. Download the web clipper browser extension from <https://evernote.com/webclipper> for Chrome, Safari, Internet Explorer 7+, Firefox, Opera, and mobile platforms.



You can use Evernote® to organize your stored case research into topical notebooks, such as Employment Discrimination, Landlord Tenant, Search and Seizure, etc. Then, when you save individual research files, such as case law, you can assign it to the proper topical notebook and tag it with identifiers such as the matter(s) it references, its case proposition and disposition, fact pattern, and jurisdiction. The next time you need a SCOTUS case on sex discrimination, you can use Evernote® search terms to retrieve it. No more wasting time searching through stacks of printed case law for that one case proposition you need or reinventing the wheel by doing sophisticated searches in Westlaw or Lexis to locate something you've previously found.



Clear Your E-mail Inbox with E-mail Forwarding

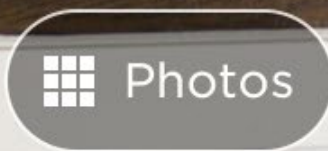
Use Evernote® on your quest to achieve Inbox Zero. Delete, delegate, respond, or file (to Evernote®). Many times, you'll want to keep an e-mail for reference; if so, you can forward the e-mail to your Evernote® account by using a unique Evernote® e-mail address (for premium users only) or by using the free Evernote® web clipper with Gmail or free Evernote® add-on for Microsoft Outlook (Outlook versions 2010 and 2013).

Take Quick, Searchable, and Organized Meeting Notes

Evernote® is an excellent tool for quickly taking and saving meeting notes. Start a note with a click of a button from your computer or mobile device. Evernote® automatically saves the note and syncs it to all your devices when you are connected to the Internet.

You can also save handwritten notes as searchable PDFs in Evernote® by

using Evernote's® built-in mobile photo tool to snap a picture of your handwritten notes for direct upload to your Evernote® account.



My NOTES

- One
- Two
- Three

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Collect and Store Business Cards

What do you do with all those business cards you brought home from last night's networking event? Do you leave them on your desk to inevitably be trashed or put them in a box in perpetuity never to be referenced again? Instead, upload them immediately to Evernote®. By snapping a photo of a business card using the Evernote® app from your mobile device, all the relevant information is immediately collected and imported into your Evernote® account, as well as other contact databases such as Outlook. You can also use Evernote's® one-click LinkedIn feature to find your business card contact in LinkedIn and request a connection.

Save



name Heidi S. Alexander Esq

title Director

company Practice Management Services

email heidi@masslomap.org

phone (857) 383-3250

fax (617) 482-9909

address 31 Milk Street, Suite 810
Boston MA 02109

SAVING AS

Business Card ▼



The tools mentioned in this article merely scratch the surface of Evernote's® capabilities and benefits to your practice. For more information about how Evernote® can help your practice, go now to <http://ambar.org/evernote> to pick up a copy of the new book!

New book alert: Evernote® as a Law Practice Tool

Today's law practice requires you to be über efficient with your time. But, how is that possible when you've got a slew, of never-ending moving pieces - from administration, marketing, finance, case management, legal research, and more? You need a central repository for storing and using information that you need on a daily basis. Evernote® is the solution. Implement it into your practice and you can look forward to more available time and a clearer mind for focusing on billable tasks.

Published by the Law Practice Division of the ABA, [Evernote® as a Law Practice Tool](#) delves into how lawyers can use Evernote® effectively in their law practices. Author Heidi Alexander, Esq., Director of the Massachusetts Law Office Management Assistance Program, instructs new users on essential features and provides power users with tips and tricks to get the most out of Evernote®. Chapters include specific uses for law firms, case studies from real practitioners, and a discussion on security as it relates to attorney obligations.

To order a copy of [Evernote® as a Law Practice Tool](#) today, visit the [ABA Webstore](#).