



## TECH TOOLS TO AUTOMATE AND STREAMLINE YOUR PRACTICE

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**Overly lawyerish disclaimer:** Throughout these materials and my presentation, I discuss a number of products by name. This is not an endorsement of any specific products and I have attempted to include at least some alternatives so you don't feel you have to use the products I refer to. The products I discuss primarily are my favorites, but much of that is personal preference and light on merit-based analysis. If you would like more information about the pros and cons of various products or longer lists of alternatives, feel free to reach out to me. If I don't have the answer, google will (or Bing, or yahoo, or AskJeeves, . . . )

### I. CLIENT ACQUISITION TOOLS

**Social Media/Blogs** - Whether it's Twitter (my favorite), Facebook, LinkedIn, Instagram, Youtube, Blogs, or even Snapchat (yes, people use this for professional communication) a strong social media presence can be a huge, free marketing tool for your firm. For those of you unfamiliar with the various types of social media, I'll borrow from Greg McLawsen and the Urban Dictionary definition of "social media":

*Twitter - I'm eating #doughnuts*

*Facebook- I like doughnuts*

*LinkedIn - My skills include doughnut eating*

*Instagram - Here is a polaroid-esc photo of doughnuts*

*Youtube - Here I am eating doughnuts [on video]*

*Blogs - Top ten best donuts in the area*

*Snapchat - Goofy donut picture [and now it's gone]*

Regardless of the platform you chose (and I would recommend using multiple), social media gives you a way to put yourself out there as an expert and a unique individual without large time commitments. Social media is a terrible platform to “advertise” from, but by putting yourself out there you create a way for potential clients to find you without having to pay companies to boost your SEO [search engine optimization]. Social media is free, but can also include paid advertisements targeted at your audience. Blogs can be paid or free, but nicer ones tend to require some payment, some popular options are Wordpress, Blogger, Tumblr, and Weebly.

**Hootsuite** is a social media management tool that allows you to schedule posts, automate tasks, and monitor your brand. With Hootsuite, you get a dashboard of all of your social media profiles in one location (including analytics on how well your posts are doing. The user interface is less than ideal, but it works by allowing you to view multiple, customizable feeds. Do you want to follow the #appellatetwitter hashtag? Or see whenever your brand is mentioned across multiple platforms? Hootsuite does all of that. It also allows you to draft posts, and schedule a time for them to be released across all of your social media platforms. Instead of spending time every day to post and repost, Hootsuite allows you to spend an hour or two a week setting up your social media marketing for the week/month. Hootsuite comes in free and paid versions. Similar products include SproutSocial, Buffer, Sprinklr, and ViralHeat.

**Self help tools** allow you to build systems that attract clients without your continued management. It can be as simple as adding a resources page to your website with free forms, and curated information, or helpful links for potential clients. (for examples see

palacelaw.com and soundimmigration.com). Or it can be as complex as a website designed to help you draft your own will (e.g. wa-wills.com; accesslegaldocs.com). Other companies have built decision trees to try to narrow down questions potential clients have and direct them to the resources they need (e.g. ctlawhelp.org). These tools can be as cheap or expensive as your technical skill and goals will allow. What types of resources you should include depends entirely on your practice area and what resources would be beneficial to your clients.

**Avvo** hosts lawyer profiles and allows lawyers to interact with potential clients by answering their questions online. Avvo builds a profile automatically for every lawyer barred in every state. However, to build a useful profile, you have to claim it and fill in the information Avvo requests. Avvo also allows individuals to ask legal questions and allows registered lawyers to answer them, opening a channel of communication with potential clients. While most of Avvo's features can only be found online, Avvo does have an app (AvvoJD) that allows attorneys to get notifications when question are asked in their geographic and practice areas and answer questions from their phone. Avvo itself is free, but attorneys can pay to advertise on Avvo and get connected directly with clients for consultations. Similar companies include Justia, LawGuru, and Lawyers.com.

## II. INTAKE TOOLS

**Google Forms** is a cloud-based, fillable form. You build the form which asks a series of questions you want the answer to (including decision trees where yes/no answers will lead to different follow up questions). Questions can be formatted in a number of ways including, long form, yes/no, multiple choice, and select all that apply. You can make questions optional or mandatory for information you want (SSN) and information you need (client name). These forms can be sent to potential clients to complete prior to or after an initial consultation simplifying the collection of data and reducing the need for

paperwork.. Like all google products, Google Forms comes in free and paid version and has an app. Airtable and SurveyMonkey are similar products. Adobe also allows you to create your own fillable forms with the additional bonus of enabling signatures through echosign so clients never have to come in to the office (not even to sign contracts). Even if multiple people have to sign a document, Adobe and similar programs allow you to send documents through multiple signers until all the signatures needed are collected.

**Google Sheets** is a cloud-based spreadsheet. Answers from Google Forms will be stored in a Google Sheet, but Google Sheets can have its own purposes during the intake process. Because it is cloud based, information in google sheets can be added by one person (perhaps a receptionist four offices down) and pulled up by another as the call is transferred. Two people can even add information at the same time, so while the receptionist is jotting down call dates and times, you can be talking to the potential client and taking notes about their situation. Office 365 has similar cloud programs.

**Calendly** is (not surprisingly) a calendaring program. Calendly allows you to sidestep the hassle of scheduling meetings with others. Send them a link to your calendar, and they will be able to chose from a predetermined set of times to meet with you. Opposing counsel wanting to set up a deposition? Or Judges setting a hearing? With a simple link they can see every time you are available and you'll be notified when they pick a time. Post a link on your website and clients can schedule intake calls without you having to do anything. Clients get the convenience of talking to a lawyer at a time that works well for them, and you don't get interrupted by potential client calls when you are in the middle of work. Calendly comes with an app and includes free and paid versions. ScheduleOnce is a similar product.

**Alert Communications** is an external receptionist. Twenty-four hours a day seven days a week, potential clients can call your number and be routed through a receptionist at

Alert Communications. Or, times can be limited to when your office is not open, filling in the gaps when you would normally be unable to take on new clients. When a client calls you, they will be routed to a receptionist who can ask a series of questions (predetermined by you) and, depending on the answers, the call will either be forwarded to you or the potential client will be told to expect a call back and an email with information will be sent to you immediately. Receptionists like this can help simplify your intake process and weed good cases from bad. Alert Communications charges by time used. Office Sense is a similar product.

**Drift** is a chatbot that engages clients as they peruse your website. Shortly after a client goes on to your website, a box will appear engaging your visitors and asking if they would like help (or have questions). When someone responds, a member of your team will be notified to reach out to them. Drift, like Alert allows the machine of client acquisition to operate even when you aren't doing anything. Drift has free and paid versions and integrates with other programs. It also includes a Drift App so you can get notifications anywhere. Ngage Live and James Publishing are similar products that use outside receptionists to answer questions at any time of the day.

**Skype** is a video communication service. It can be accessed from any computer and includes apps. Skype allows you to meet face to face with clients all over the world from the comfort of your home or office. Skype is an essential tool for anyone who wants to expand their firm to take on clients all over the state (or country). Potential clients have to create a login and have a camera and mic available. In the smartphone era, most client have no trouble engaging though slack. Skype comes in free and paid versions. Similar programs include Google Hangouts and Facetime.

**Tiny Scanner** is indeed a very small scanner, the size of your smartphone, because it's a phone app. However, this app goes beyond just taking a picture of documents. If you have to meet with a client outside of the office, Tiny Scanner allows you to take a photo

of a document, then align the margins to the four corners of the paper, adjust the brightness, and then automatically create a nice-looking, searchable pdf. Tiny Scanner has free and paid versions. Scannable and CamScanner are similar products.

**Lexicata** is a unique tool designed to manage and simplify your intake process. It combines integrated metric tracking, kanban boards, and automated forms into one platform. Lexicata is cloud based, and syncs with some practice management software. Pricing is set at a flat rate based on each individual user.

### III. WORKFLOW TOOLS

#### **Cloud Practice Management**

Rather than go through all the various options for cloud practice management, I will include some of the most popular, and the primary advantages that cloud practice management offers. 1) Work from anywhere. Office space can drastically increase a firm's overhead and, in many circumstances, is unnecessary. Even when office space is necessary, why not give yourself the option to work from the courthouse, on vacation, or from the beach's of Thailand (what some call the second office). 2) Integrate with other cloud based programs. Cloud-based programs are designed to work with other cloud-based programs. Your practice management tool is the quarterback of your firm; all other tools should rely upon it and report back to it. With cloud-based practice management software, email, documents, and data can all be automatically linked to your central database. (See infra VII. CONNECTING & AUTOMATING) 3) Increased security and backups. Although a lot of people fear the cloud, a little due diligence will protect you and it can be much safer than most computer hard drives. For instance, cloud practice management comes with automatic back ups so ransomware can be ignored. Furthermore, strong passwords and two-factor authentication can make it incredibly difficult for anyone other than you to access your data. Common cloud-based

practice management tools are Clio, Rocket Matter, Abacus, and Amicus Attorney. These tools are priced on a user-by-user basis.

**Trello** is an online Kanban board, designed for collaboration. Trello allows you to manage your workflow, delegate tasks, monitor progress, and collaborate on documents from anywhere. It can be accessed through an online website or a mobile app so you can take your work anywhere. In its simplest form, Trello is your basic Kanban board where you can create cards for tasks (and checklists within those cards) and move them from To Do, to Doing, to Done. But in a paperless office, Trello can also be used as a virtual dashboard where you can organize and monitor all the documents that would normally clutter up a desk. Workflow on a Trello board is broken up into lists (e.g. To Do), cards (individual tasks or projects), and checklists (task lists within a card). Collaborators can be added on to and allowed to edit an entire board, or individual cards, and tasks can be delegated and discussed in a comment feed on each individual card. Trello has free and paid versions and comes with a number of add ons to increase productivity and automate tasks (e.g. repeating cards).

#### IV. COMMUNICATION TOOLS

##### **Paperless communication**

There are a number different ways you can communicate with clients beyond the standard emails, phone calls, and faxes. Rather than go through each individual tool, I thought it would be helpful to introduce a couple of my favorites and how to use them. 1)

**Texting** - more and more clients prefer texting to phone calls, but office phones rarely include texting. For those without the ability to text, use email instead. For clients it's as simple as sending a regular text message to your email address. For attorneys, you need to know your client's phone number, and provider. Each provider has a unique @domain.com (e.g. Verizon has @vttext.com). Text messages can be sent to phone#@domain.com. 2) **Portals** - for added security, client portals can be a great

communication tool. Client log in and can send messages directly to you. Some practice management tools (like Clio) have built in client portals and messaging. 3) **eFax**- fax machines are obnoxious, but many courts and companies still request delivery by fax. With eFax tools, you can send faxes from your email, no printing required. Some popular options include RingCentral, eFax, and MyFax are common options.

**Zoiper** is a tool for those of you who work from your private phone. Zoiper is a phone app that allows you to call clients from a work number while on your cell. Incoming client calls can also be filtered through Zoiper so you can separate your work calls from your personal calls. Zoiper has free and paid versions. Google Talk is a similar product.

**Ruby Receptionist** is similar to Alert Communications (supra II. Intake) but built to mimic a regular receptionist. You set your business hours, and Ruby will filter all of your calls. When someone calls the office, a receptionist at ruby will answer, then call you to see if you would like the call. Like an in-office receptionist, you can set do-not-disturb times with ruby, or request that only certain calls be put through. Ruby is a pay per month system with prices varying by use.

**Crystal** is a unique tool designed to help you communicate better with people. Crystal uses the DISC personality assessment to suggest communication tactics that will aid in working with specific individuals. Crystal uses online personality profiles to estimate people's personalities. You can also get email and calendar plugins that will suggest edits to your emails or give you a daily briefing of how to interact with the people you are meeting each day. Crystal has free and paid versions. The company is new so new features and changes come often (including a new text reader that will analyze resumes). LinkedIn is working on a similar product.

**Slack** evolved from instant messaging through email platforms (AOLinstant messenger, google's chat feature, Hotmail IM). The purpose was to move teams away from long



chain emails and into a program organized around work activities. There are two basic options for sending a message in Slack: private messages and messages to a channel. Private messages can be sent to one or more individuals and operate in exactly the same way a text message on a phone works. Channel messages are identical in appearance and operation, but serve a different purpose. Channels are generally created for a specific purpose and serve as a repository for all communication on that subject. Are you working on an appeal? A class action lawsuit? Channels allow you to create a discussion feed for each specific subject and limit participants to those who are working on the project. Slack contains both free and paid versions and has hundreds of add-ons from robots that order food for you, to analytics tools, to gif creators (including one that links your Trello board to a Slack channel). Microsoft Teams and Google Talk (aka gchat) are similar products.

## V. COLLABORATION TOOLS

**Slack** is great for collaboration because it encourages team communication around projects and subjects. It also allows team members to work on projects together without being in the same place. (see above for more info).

**Grammarly** is an advanced editing program that works to improve your writing beyond spell check and comma placement. I include it in collaboration because Grammarly is like a robot that can review and edit your documents. In a sense, you are collaborating with the program to improve your work. Grammarly comes in the form of plugins for your email, browser, and word processor. Once installed, it acts just like a spell check function, suggesting changes in real time. Grammarly comes in free and paid versions. Wordrake and PerfectIt are similar tools that can be used in addition to or instead of Grammarly. PerfectIt is specifically designed for legal work.

**Dropbox** is a cloud-based document storage repository. For a longer discussion of the advantage of cloud services, see III. WORKFLOW **Cloud Practice Management**.

Instead of storing files on individual computers (a really dangerous idea) or on a shared server, Dropbox gives you the same features, but is easily accessible by anyone on your team anywhere. It also comes as an app. Dropbox comes in free and paid versions. Similar products include Google Drive, Office 365, and Adobe.

**G-Suite** is a cloud version of all your basic office tools; email, word processor, spreadsheets, and slideshows. It functions in exactly the same way Microsoft Office tools work, but they can be accessed from anywhere. Documents can easily be shared with others on an edit, view, or own basis. Best of all, multiple people can work on the same document (at the same time if necessary). All changes are tracked and previous versions can be recalled at any time. And it comes with the same security and collaboration features any cloud service has. G-Suite has free and paid versions. Office 365 is a similar product.

**Trello** is discussed deeply in III. WORKFLOW. It's worth noting here, however, that Trello is also an excellent tool for collaboration because teams can share a board easily. Cards and tasks can be assigned to individuals or teams, and people can communicate easily within the program and work simultaneously.

## VI. TOOLS FOR TRACKING PERFORMANCE

**Google Forms** - In addition to helping with the intake process (see II.. INTAKE above) Google Forms can provide valuable feedback from your clients and helps you track our own metrics. Build a survey form and send it to our clients for feedback. At the close of a case enter time metrics and profits so you can keep a database of relevant information. Survey monkey and Asknicely serve similar purposes. Asknicely is especially useful for those who track net promoter score.

**Airtable** is a relational database (a series of connectable spreadsheets). On a basic level Airtable works like any other spreadsheet. The bonus of Airtable is that you can track data points (clients) throughout multiple spreadsheets by giving each client a unique code. You can track client satisfaction in one spreadsheet and income in another, then link the two to discover valuable data about your firm's work. Airtable has an app and comes in free and paid versions. Google sheets has most of the capabilities of Airtable. Periscope Data is another option, but requires an understanding of SQL coding.

**Cloud accounting** - The value of accounting software need not be explained here, but there are some advantages to cloud software. Most importantly, cloud accounting software can be integrated with other cloud programs. These integrations can help you track data and automate billing. Popular cloud accounting software includes Xero, Quickbooks, and Freshbooks.

**Tatsu** - is a Slack-based chatbot that conducts standup meetings for your team, even when you can't get together in one room. While Standups are a core principle of the Agile system, conducting them in a firm can be difficult (even harder for a solo practitioner). Tatsu allows you to set a schedule and write questions for your standup. At the designated time, Tatsu will kick off the stand up by asking each of your team members (one by one) the designated questions. When every team member has responded, Tatsu will send everyone an email with an overview of the answers. Tatsu charges \$1 per user per month. Standup Bot and Geekbot are similar programs.

## VII. CONNECTING & AUTOMATING TOOLS

**Zapier** - is a connectivity and automation tool. Most of what Zapier does, is link your cloud programs I offer to automate tasks. Link an excel sheet to your twitter account on

Oder to send regular tweets. Link your email to your Trello board to automatically create cards. Or one of my favorites, link an excell sheet to Clio to create an automatic calendaring app that creates hundreds of appointments and reminders based on the input of a trial schedule. Zapier works in two simple steps that can be repeated and added on to: a trigger and a result. The trigger is the initiating action you take in one of the cloud programs (e.g. creating a new matter in Clio). The result is the task you want to happen after (e.g. creating a new Trello card for that matter and generating firm letters in Google Docs). With Zapier, you only have to do one trigger and dozens or hundreds of results can be automated. In addition to syncing with cloud programs, Zapier has its own actions including time delays, repeats, and SMS text messages. Zapier has free and paid versions depending on volume of use. If This Then That (IFTTT) is a similar program.

**Airtable**, as mentioned above (see VI. TRACKING PERFORMANCE), is a great tool for connecting all of your data. It can also be used in conjunction with programs like Zapier and a little bit of basic mathematical coding to build powerful tools for litigation, calendaring, document automation, and more. Depending on the time investment you want to put in, these programs can even be used to auto generate documents as soon as an intake is completed.

## **Cloud program integrations**

This is not a specific program, but it is worth mentioning, that many of the cloud based software discussed above comes with its own integrations and automations. By simply allowing an add on, Trello and Slack Clio and G-Suite, and G-Suite and Slack (to name a few) can be merged. These integrations can make your work more seamless and increase collaboration. Many of these programs also come with optional add ons that can automate and simplify your work. Some commonly used examples include: repeating trello cards; a built in slackbot that sends you reminders, assigns tasks, and answers questions; a calendar connection to your kanban board showing due dates for all work; and dozens of Slack-based bots that can do everything from run standups (Tatsu) to ordering pizza and posting random gifs. For those who want to get more adventurous, simple bots can be created to automate tasks and perform handy tricks like legal research.