

Harnessing Technology to Improve Your Practice

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10:00 AM – 11:30 AM

Presented by:
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OSB Professional Liability Fund

Materials:

- PowerPoint slides
- The following written materials and more can be found on the PLF's website, <https://www.osbplf.org/>:
 1. Saving Text Messages as Part of the Client File, <https://www.osbplf.org/assets/forms/pdfs//Saving%20Text%20Messages%20as%20Part%20of%20the%20Client%20File.pdf>
 2. Send Text Messages to Your Clients Without Using Your Cell Phone, <https://www.osbplf.org/inpractice/send-text-messages-to-your-clients-without-using-your-cell-phone/>
 3. Saving Text Messages, <https://www.osbplf.org/inpractice/saving-text-messages/>
 4. Client Portals: Take Control of Client Communication, <https://www.osbplf.org/inpractice/client-portals--take-control-of-client-communication/>
 5. Working and Meeting in the Age of Social Distancing, <https://www.osbplf.org/inpractice/working-and-meeting-in-the-age-of-social-distancing-/>
 6. Client Intake: Making it More Effective and Efficient, <https://www.osbplf.org/inpractice/client-intake--making-it-more-effective-and-efficient/>
 7. CLE: More Than Just a Click: Automating the Client Intake Process, https://www.osbplf.org/cle_classes/more-than-just-a-click--automating-the-client-intake-pr/view/
 8. Electronic Signature: A Tool to Incorporate in Your Law Practice, <https://www.osbplf.org/inpractice/electronic-signature--a-tool-to-incorporate-in-your-law-practice/>
 9. Protecting Yourself and Your Law Firm from Data Breach Checklist, <https://www.osbplf.org/assets/forms/pdfs//Protecting%20Yourself%20and%20Your%20Law%20Firm%20from%20Data%20Breach%20Checklist.pdf>
 10. Protect Your Data By Using Encryption, https://www.osbplf.org/assets/in_briefs_issues/Protect%20Your%20Data%20by%20Using%20Encryption.pdf

11. Cybersecurity and Employee Training,
https://www.osbplf.org/assets/in_briefs_issues/Cybersecurity%20and%20Employee%20Training.pdf
12. Understanding Security When Using Cloud Storage,
<https://www.osbplf.org/inpractice/understanding-security-when-using-cloud-storage/>
13. How to Backup your Computer,
<https://www.osbplf.org/assets/forms/pdfs//How%20to%20Back%20Up%20Your%20Computer.pdf>
14. What to Do After a Data Breach,
<https://www.osbplf.org/assets/forms/pdfs//What%20to%20Do%20After%20a%20Data%20Breach%20-%20April%202016%20In%20Brief.pdf>
15. Cash Flow Worksheet 12 Month,
https://www.osbplf.org/assets/forms/practice_forms/Cash%20Flow%20Worksheet%2012%20month%20-%20legal%20size.xls.xlsx
16. Disaster Planning and Recovery Checklist,
<https://www.osbplf.org/assets/forms/pdfs//Disaster%20Response%20and%20Recovery%20Checklist.pdf>
17. Disaster Planning and Recovery Resources,
<https://www.osbplf.org/assets/forms/pdfs//Disaster%20Planning%20and%20Recovery%20Resources.pdf>
18. ABA Technology Resources
<https://www.osbplf.org/assets/forms/pdfs//ABA%20Technology%20Resources.pdf>







Virtual Receptionists

	Pricing	Hours	Live receptionist	Call routing	Appt scheduling	Voicemail box	Call overflow	Outbound calls	Free local/toll-free #	Client intake
Back Office <i>Betties</i>	\$189/mo 75 min	8am-6pm PT Mon-Fri	✓	✓	✓	✓	✓	✓	✓	✓
LEX <i>Reception</i>	\$199/mo 175 min	24/7	✓	✓	✓	✓	✓	✓	✓	✓
<i>PATLive</i>	\$99/mo 50 min	24/7	✓	✓	✓	✓	✓	✓	✓	✓
<i>ruby.</i>	\$269/mo 100 min	8am-9pm PT Mon-Fri	✓	✓	✓	✓	✓	✓	✓	✓
<i>smith</i>	\$70/mo 10 calls	8am-6pm PT Mon-Fri	✓	✓	✓	✓	✓	✓	✓	✓

Send Texts Through Computer



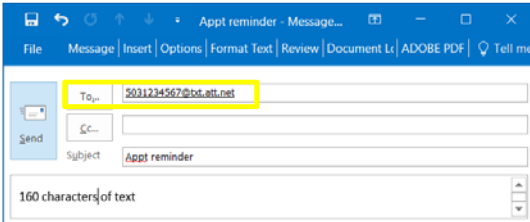
What you need:

- Client's cell phone number
- Client's phone carrier
- Carrier's SMS gateway address

<https://www.osbplf.org/inpractice/send-text-messages-to-your-clients-without-using-your-cell-phone/>

Steps for sending text through computer:

1. Compose a new email
2. In "To" field, insert client's 10-digit phone number (no hyphens) followed by @gateway address
3. Write message under 160 characters.
4. Hit "Send."



Use client portals

- Communicate and share documents
- More secure
- Clients have 24/7 access to info



Conferencing Made Easy



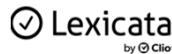
Pricing		Free	Conference call	Video conferencing	Recording	Screen sharing	Meeting duration	Desktop/mobile	Capacity
	\$13.50/mo	Limited	✓	For paid only	✓	No limit	✓	Up to 100	
	\$10/mo	✓	✓	✓	✓	Group: 40 min 1:1: unlim	✓	Up to 100	
	\$16.95/mo	✓	✓	For paid only	✓	No limit	✓	Up to 25	
	\$15/mo	✓	✓	✓	✓	45 min	✓	Up to 10	
	\$14.99/mo	✓	✓	✓	✓	Group: 40 min 1:1: unlim	✓	Up to 100	

<https://www.osbplf.org/inpractice/working-and-meeting-in-the-age-of-social-distancing/>



Client Relationship Management (CRM)












- Client management: gather client info, track progress, stay in contact
- Business development: follow up with leads, intake and onboard new clients
- Data analysis: analyze relationship, pipeline, conversion rate










Automating Processes

Intake and onboarding

- Online scheduling |   
- Online forms |   
- Electronic signing |   
- Workflow automation tool |  

Payment Processors






	Inst.	Integration	Accept payments	Payment via website	Recurring payment	Accepts major CC	eChecks/ACH	Issue refunds	Trust account compliance
	Web	No	✓	✓	✓	✓	✓	✓	✓
	Web	bill4Time, TimeSolv, Time59, Clio, CosmoLex, Zola Suite, PracticePanther	✓	✓	✓	✓	✓	✓	✓
	Web	RocketMatter	✓	✓	✓	✓	✓	✓	✓
	Web	No	✓	✓		✓	✓	✓	
	Web	No	✓	✓		✓		✓	

Practice management

All-in-one software that automate many of a law firm's operations



Practice Management Software

	Pricing	Case/matter mgmt.	Document assembly	Document mgmt.	Workflow tool	Trust accounting	Full accounting	Online payments	Billing & Invoicing	Client portal
	\$89/user/mo	✓	✓	✓	✓	✓		✓	✓	✓
	\$79/user/mo	✓	✓	✓	✓	✓	✓	✓	✓	✓
	\$49/user/mo	✓	✓	✓	✓	✓		✓	✓	✓
	\$39/user/mo	✓	✓	✓	✓	✓	✓	✓	✓	✓
	\$59/user/mo	✓	✓	✓	✓		✓	✓	✓	✓

Document Assembly

Robotic document drafting:
Automatically fills in correct data



- Save time
- Reduce errors
- Boost productivity

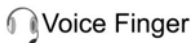


Voice recognition

Dictation, device control, and more

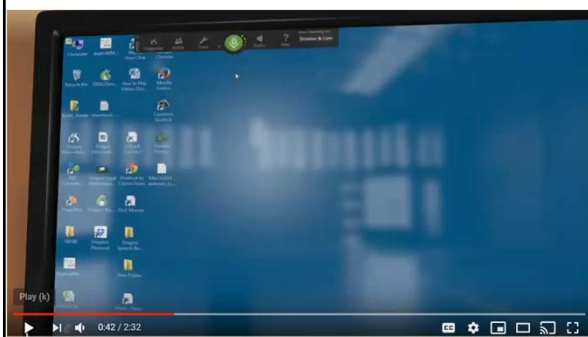


- Automatically transcribe speech into text
- Edit and format documents
- Control computer's programs and web browsers



- Dictation
- Fewer features

Voice recognition in action





Protecting Client Data

Encrypting Emails

Risks of sending unencrypted emails

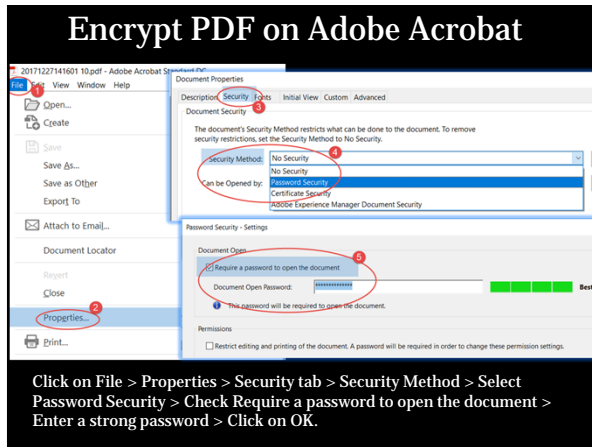
- Intercepted or viewed by unintended parties
- Breach of client confidentiality
- Potential malpractice exposure

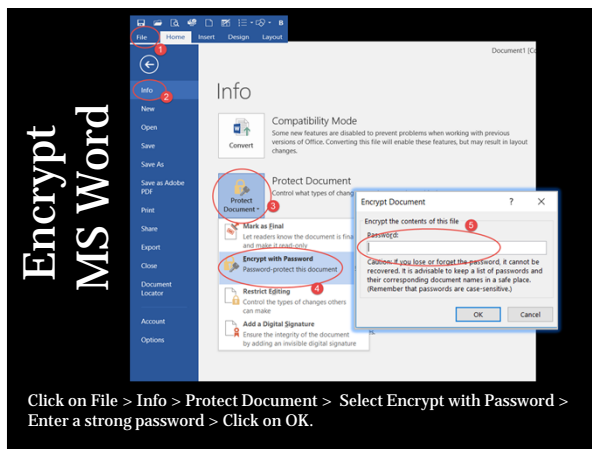
Protect against risks by encrypting emails

Tools to Encrypt Emails

Outlook Users	Digital ID
Encrypted webmail	ProtonMail Hushmail StartMail
Email encryption software	Trustifi TitanFile virtru zix







Cloud Security



Why encrypt before uploading to cloud storage?

Prevent access by provider
Make file sharing more secure

<https://www.osbplf.org/inpractice/understanding-security-when-using-cloud-storage/>

Encryption Software
for Cloud Storage



Zero-knowledge Cloud
Storage Providers






Full Disk Encryption

Makes data on
computer unreadable
without decryption
key

Prevents
unauthorized access
when computer is
lost or stolen

 **Windows**

Bitlocker

- Built-in full-disk encryption
- Only available in Windows 8, 10 Pro or Enterprise version

<https://support.microsoft.com/en-us/help/4028713/windows-10-turn-on-device-encryption>
<https://www.howtogeek.com/192894/how-to-set-up-bitlocker-encryption-on-windows/>

Third Party Encryption Programs

- VeraCrypt
- DiskCryptor
- COMODO Disk Encryption

Comparison chart: https://en.wikipedia.org/wiki/Comparison_of_disk_encryption_software

 **Mac OS**

FileVault 2


- Built-in full-disk encryption
- Only available in OS X Lion or later

<https://support.apple.com/en-us/HT204837>





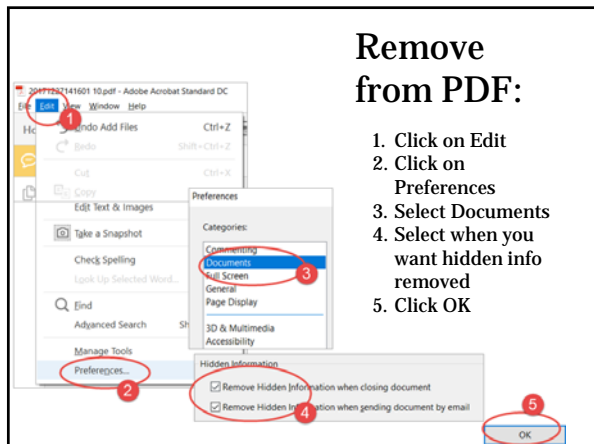
Physical device for backing up	
Hardware: <ul style="list-style-type: none"> External hard drive External solid state drive (SSD) Backup server Portable drive 	Software: <ul style="list-style-type: none"> Native: Windows Backup; Mac Time Machine 3rd Party: Acronis True Image; AOMEI Backupper; EaseUS To Backup
Physical device w/ built-in backup software	
<ul style="list-style-type: none"> Seagate Backup Plus drive Western Digital My Passport portable drive Samsung T5 SSD Netgear ReadyNAS (network attached storage) Western Digital My Cloud (network attached storage) 	
Cloud	
<ul style="list-style-type: none"> Backblaze Carbonite iDrive SpiderOak SOS Online Backup 	



Confidential information or information prejudicial to the client may be revealed through metadata

Prevent inadvertent disclosure by scrubbing metadata before exchanging documents

Remove from PDF:



1. Click on Edit
2. Click on Preferences
3. Select Documents
4. Select when you want hidden info removed
5. Click OK

Remove from MS Word:

1. Click on File
2. Click on Info
3. Check for Issues
4. Inspect Document
5. Click on Remove All

Print to PDF:

1. Click on File
2. Click on Print
3. Select Adobe PDF from printer menu list
4. Click on Print
5. Rename and save the PDF file

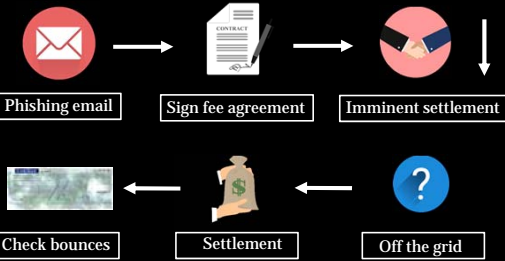
Cyberattacks and Scams

Cyberattack from hacker's perspective



Credit: Cisco, <https://www.youtube.com/watch?v=4gR562GW7TI>

Financial Scams



Red Flags

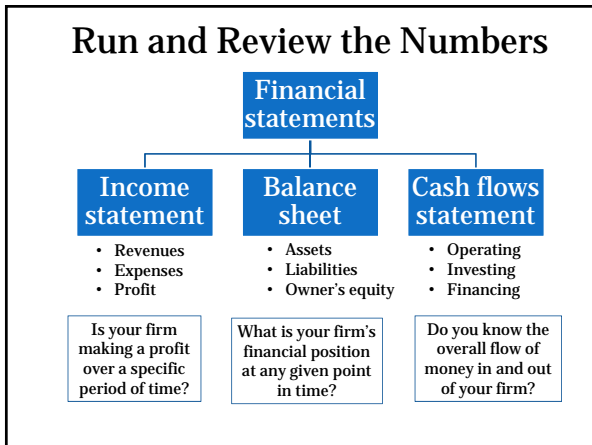
1. PC is not from around your area
2. Easy money for little work
3. Matter is resolved quickly
4. Demand prompt refund or payment
5. Lag time between incident and you

If flag is raised:

- Research/investigate
- Always wait for check to clear
- Decline representation



Manage your firm's financials








Accounting Software

	Pricing	Install.	Double entry bookkeeping	Connect to bank acct.	Billing/Invoicing	Online Payments	Expense tracking	Bank reconciliation	Reporting/Analytics
BOOKS	\$19 /month	Cloud	✓	✓	✓	✓	✓	✓	✓
quickbooks	\$40 /month	Cloud	✓	✓	✓	✓	✓	✓	✓
Quicken	\$34.99 /month	Cloud		✓	✓	✓	✓	✓	✓
FRESHBOOKS cloud accounting	\$12.50 /month	Cloud	✓	✓	✓	✓	✓	✓	✓
xero	\$60 /month	Cloud	✓	✓	✓	✓	✓	✓	✓

Manage time and tasks



Task Management Software

	Pricing	Install.	Collaboration	Recurring tasks	Create subtasks	Reminders	File sharing
 asana	\$10.99/mo	Cloud	✓	✓	✓	✓	✓
 Microsoft To-Do	Free	Cloud	✓	✓	✓	✓	✓
 todoist	\$0-\$5/mo	Cloud	✓	✓	✓	✓	✓
 remember the milk	Free or \$39.99/yr pro	Cloud and DeskT	✓	✓	✓	✓	(only w/Dropbox or Google Drive)
 Trello	\$0-\$20.83/mo	Cloud	✓	✓	✓	✓	✓

Move Tasks Along Kanban Board

TO DO	DOING	DELEGATE	DONE
Task 1	Task 5	Task 8	Task 10
Task 2	Task 6	Task 9	Task 11
Task 3	Task 7		
Task 4			

Manage Deadlines

Malpractice Risk:

- Missed deadlines












Reduce Risk By:

- Use reliable calendaring system
- Promptly enter deadlines and reminders

Consider:

- Sync calendar across all devices
- Use rules-based calendar software

Rules-based calendaring software


Stand-alone rules-based calendaring software	Practice management software integrates w/ stand-alone tools	Practice management software w/ built-in rules-based calendaring
	 	
	   	 

Preparing For Disasters

1. Back up
2. Have a response plan
3. Update client list
4. Inventory equipment and office contacts
5. Get adequate insurance

Helpful Apps

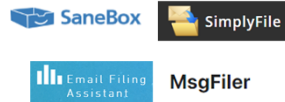



 Add "in case of emergency" (ICE) contact to smartphones
<https://www.wikihow.com/Add-ICE-to-Your-Cell-Phone>

Overwhelmed by Emails?

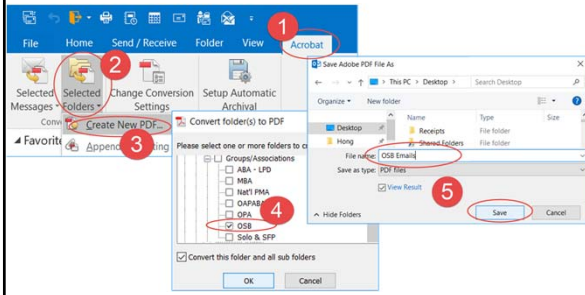


- Create folders & automatic rules
- Consider using email plug-ins



Save emails as one PDF

1. Click on Adobe tab
2. Click Selected Folders
3. Select Create New PDF
4. Choose folder to save
5. Rename file and click Save





Saving text messages

1. Screenshots
2. Third party applications

<https://www.osbplf.org/inpractice/saving-text-messages/>

Saving Texts Using Third Party Apps

<i>iPhone</i>	<i>Android</i>
<ul style="list-style-type: none"> • iExplorer (Mac and PC) • Decipher Text Message (Mac and PC) 	<ul style="list-style-type: none"> • SMS Backup & Restore • SMS Backup+ • Super Backup & Restore

Useful Article: "Documenting Text Messages for Trial or Legal Matters," <https://deciphertools.com/blog/documenting-text-messages-for-legal-evidence-or-court/>

Mobile Scanning

Turn your phone into a portable scanner



- Captures 4 corners of a document; not background
- Save as PDF & perform OCR
- Enhance and annotate scanned images
- Integrate with cloud storage

Scanning Apps:

CamScanner Scannable by Evernote
Google Drive's App Genius Scan Scanbot

Print & Save Webpages

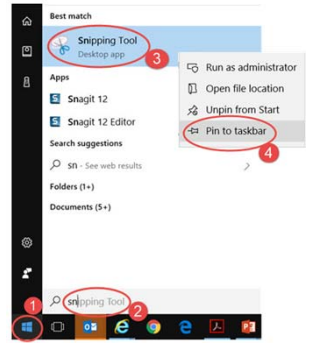
- Make any webpage print friendly
- Remove annoying graphics
- Add it to your browser
- Get a button for your website




<http://www.printfriendly.com/>

Screen Captures

Windows Snipping Tool



1. Click on Windows button

2. Type "snipping tool" in search box

3. Right click on the result list

4. Select Pin to taskbar

What the Internet Knows About You (and Your Clients)

- Social media
- Web browsers
- Computing devices
- Internet of Things (IoT)

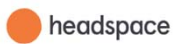
Lawyers: Privacy | Ethics
Clients: E-discovery



Balancing act...



Apps for wellness





Other Resources

Cybersecurity Training

- BrightWise (<https://www.bright-wise.com>)
- Inspired eLearning (<https://inspiredelearning.com>)
- KnowBe4 (<https://www.knowbe4.com>)
- Proofpoint (<https://www.wombatsecurity.com>)
- Webroot (<https://www.webroot.com/us/en/business/security-awareness>)

<p>Lynda.com</p> <ul style="list-style-type: none"> • Technology Overview • Productivity Tips: Using Technology 	<p>Oregon E-court</p> <p>Self-help: https://oregon.tylerhost.net/ofswb</p> <ul style="list-style-type: none"> • Web training sessions • Training videos • User guides
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free and confidential
