Business Continuity for Law Offices in the Face of Coronavirus

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What Constitutes A Business Disaster?

► Any event that makes the continuation of normal functions impossible

► Severity of the disaster is a function of:
  ► How long it remains impossible for the business to function normally
  ► The severity of the impairment

Ohio Stay at Home Order Extended Through May 1

Michigan extends ‘stay home’ order to April 30:
What you need to know
Order imposes new rules for stores to reduce foot traffic
Disaster Avoidance

The ability to avoid an outage or provide a controlled and well understood ability to recover systems to normal operations

Harsh Reality

According to the Institute for Business and Home Safety, an estimated 25% of businesses do not reopen following a major disaster.

According to FEMA, 40% of businesses do not reopen following a disaster and another 25% fail within one year.

The foregoing are based upon natural disasters (fire, flood, hurricane, tornado, etc.) – but is this any different?
Natural Disasters

We just had five 1,000-year floods in less than a year. What's going on?

By Scott Weaver  Follow
Scott is a Senior Climate Scientist in our Washington office.
Published September 1, 2016 in Climate Science

Editor’s note: This post was updated on Sept. 8, 2016, with results from a NOAA study on the Baton Rouge flood.

A 1,000-year flood is supposed to be extremely rare. Its chance of occurring in a given year: 0.1 percent.

Power Failure

500,000 lose power as unrelenting Dorian marches into Canada

John Bacon  USA TODAY
Published 2:30 p.m. ET Sep. 8, 2019 | Updated 4:14 p.m. ET Sep. 8, 2019

CLIMATE CHANGE AND A REALLY OLD GRID: WHY THE U.S. CAN EXPECT MORE POWER OUTAGES LIKE CALIFORNIA’S

BY BLAKE DODGE ON 10/9/19 AT 3:20 PM EDT

CALIFORNIA WILDFIRES

PG&E outages: Historic blackout under way, 1.3 million in Bay Area without power

J.D. Morris  Oct. 27, 2019 | Updated: Oct. 28, 2019 4:35 p.m.
Fire

Massive fire destroys Las Vegas office building, 100 firefighters involved

Internet Failure At The Office
Any of the foregoing events may necessitate that you be able to work remotely

Therefore, You Need…

PRACTICE PORTABILITY

The ability to communicate, draft documents, work on your practice, and access all case information from anywhere
Untethered Practice

Is it possible for you to work with maximum efficiency when you’re not at the office?
Is it possible to have lawyers or staff persons work for your firm who aren't physically present?

Technological advances have created the ability to run a full-service law firm without a physical office.

The potential of a business disaster makes it a required capability.

Used to be a want, now it's a need.
Benefits of Untethered

You lessen the severity of being displaced and you reduce the amount of time before you can work normally again.

Benefits of Untethered

Lower Overhead: Cost of physical space is often 2nd biggest expense.
Benefits of Untethered

Better Life/Work Balance: Easier to deal with personal and family needs; people are more comfortable and more relaxed.

Solitude When Needed: When one is under pressure and needs uninterrupted time to get something done, the office is often the last place they want to be.
Benefits of Untethered

**Get The Best Employees:** They don’t necessarily live close to your office

**Stay At Home Parents:** Can make fantastic part time employees
Benefits of Untethered

Work-space-in-the-home expenses
Note: Line 22900 was line 229 before tax year 2019.
You can deduct expenses you paid in 2019 for the employment use of a work space that you use to earn your employment income and that pays for them under your contract of employment. These expenses must be used to pay for space that
• is a separate and distinct area in your home;
• is your principal place of business;
• is used on a regular and continuous basis for income-producing activities;
• is not used for purposes other than business;
• is not more than 50% of the space in your home; and
• is not substantially for the personal use of you or your family.

Department of the Treasury Internal Revenue Service
Publication 587
Cat. No. 15154T
Business Use of Your Home
(Including Use by Daycare Providers)
For use in preparing 2019 Returns

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REMOTE WORKING CHECKLIST
Remote Work Checklist

- Electronic filing system and remote access to the files – not reliant upon paper files
- Mobile hardware
- Other required hardware to work remotely
- Mobile communications
- Billing & accounting with remote access
- Centralized, sharable client database - case management system
- Get documents signed remotely
- Security and protecting client data when working remotely
- Home workspace
Who led the digital transformation of your law office?

☐ Managing Partner/General Counsel
☐ Office Administrator
☐ CFO
☐ IT Director/Outside IT Company
☒ COVID-19

A Couple of Predictions

► Practice portability won’t be a luxury, it will be a requirement
► Internet reliance will grow – so it makes sense to have a backup
► Law offices will have a more geographically diverse workforce
► Web meetings instead of in-person meetings
► Lawyers less familiar with technology will be required to learn it [x]
  https://www.michbar.org/pmrc/technology-competency
► What are you going to do differently? Please email me at
  bhenley@affinityconsulting.com with your thoughts
Why Are We Still Talking About This??
Because it’s still a problem

What’s Realistic?

Eliminate all paper?
Probably not

Reduce paper?
Absolutely
Scanners Alone Don’t Solve Problem

What You Hoped For

Reality

It’s All About The Process
It’s fine to maintain some paper files

But your electronic files have to be complete
Two Basic Methods You Can Use

1. Plain folders + search utility
   - Correspondence
     - with Client
     - with Court
     - with Expert
     - with Opp Counsel
   - Deposits
     - Notices
     - Summaries
     - Transcripts
   - Discovery
     - Discovery to Defendants
     - Discovery to Plaintiffs
     - Plaintiffs Responses to ROGS
     - Plearias
     - Filed with Court
     - Notices
     - Scheduling Orders

2. Document management system (DMS)

Paper Reduction Roadmap

1. Backup systems & security (everyone has confidence in)
2. Hardware
   A. Desktop Scanners
   B. Dual monitors that rotate
   C. Tablets/ultrabooks/laptops
3. Searchable PDFs
4. Search Program or Document Management System (“DMS”)
5. If No DMS
   A. One folder per matter
   B. Consistent file naming convention
6. Digitize all incoming documents
7. Email must be stored outside your email program
8. Collaborative Technology
9. Write It Down & Provide Training
STEP 1: Bullet-Proof Backup & Security

Top 5 Causes of Data Loss

1. Accidental Deletion
2. Hard Disk Failure
3. Virus Infection
4. Power Failure
5. Human Error

Backup & Security

- Redundancy critical
- Backup rules
  - No excuses
  - Unattended is best
  - Backup everything
  - Check the backup log
  - Off-site storage
  - No incremental backups
  - Run test restores
  - Have secondary method
Backup & Security

STEP 2: The Hardware
What We Normally See

Centralized Scanning

Decentralized Printing

What We Recommend

Decentralized Scanning

Centralized Printing
One copier v. many desktop scanners

- You may need a copier, but...
- All success stories used distributed scanning

Key features for desktop scanners

- We prefer sheet fed vs flat bed
- Document feeder
- Quiet
- USB connection
- Black & white or color, legal or letter & fast
You don’t need a copier if you have printers and scanners

You can save a lot of money if you ditch the copier

Example from Client

**Situation:**
- 3 copiers and maintenance on 20 personal printers - $39,024.36/year
- Copiers never work, everyone hates them, they jam and eat documents
- **No desktop scanners** – if you want to scan, you have to use the copiers everyone hates

**Solution:**
- Eliminate 18 personal printers & 2 copiers (keep 1)
- Buy 2 HP LaserJet M608X printers (65 ppm) + stapler/stacker/collator + 2,100 sheet paper drawer
- Buy 8 ScanSnap iX1500 scanners (30/60 ppm) & 1 fi-7300NX scanner (60/120 ppm)
### Example from Client

<table>
<thead>
<tr>
<th>Description</th>
<th>Cost</th>
</tr>
</thead>
<tbody>
<tr>
<td>3 year cost to keep 3 copiers &amp; 20 personal printers</td>
<td>$117,073</td>
</tr>
<tr>
<td>3 year cost for 9 scanners, 2 new printers, 1 copier</td>
<td>$44,662</td>
</tr>
<tr>
<td>Cost savings over 3 years</td>
<td>$72,411</td>
</tr>
</tbody>
</table>

*They’ll also save approximately $1,683/year on toner*

### Recommended Flatbed Scanners

- **Xerox Duplex Combo Flatbed Scanner**  
  (25/50 ppm – $224)

- **Fujitsu fi-7280**  
  (80/160 ppm – $1,835)
Recommended Sheetfed Scanners

- **Fujitsu ScanSnap iX1500**  
  (30/60 ppm – $420)

- **Brother ImageCenter ADS-2800W**  
  (40/80 ppm – $400)

- **Canon DR-C225W II**  
  (25/50 ppm – $412)

Recommended Sheetfed Scanners

- **Fujitsu fi-7160**  
  (60/120 ppm – $831)

- **Fujitsu fi-7180**  
  (80/160 ppm – $1,469)

- **Fujitsu fi-7300NX**  
  (network scanner  
  60/120 ppm – $1,070)
Recommended Portable Scanners

- Fujitsu ScanSnap S1300i
  (8/16 ppm - $248)

- Fujitsu ScanSnap iX100
  (really slow - $190)

Buy Monitors That Rotate

Easily read documents on screen
If Current Monitors Don’t Rotate, Get a VESA Stand

Do a web search for VESA monitor stand

Dual Monitors Highly Recommended

$1,000 + for a single 49” monitor x
$280 - $300 for dual 27” monitors x
You definitely need a laptop or tablet as your primary computer

More on this later

STEP 3:
Searchable PDFs
Scanning Software

- Digital documents must be **PDFs**

- **Portable Document Format** is a file format that captures all elements of a printed document as an electronic image that you can view, navigate, print, or forward to someone else.

Types of PDFs

**Image only PDFs**
- Just an image of original
- Cannot be searched for words contained inside
- Default type of PDF from **scanners**

**Searchable PDFs (what you want)**
- Layer of searchable text behind image
- Searchable
- Indispensable
If You Have Thousands of PDFs To OCR

- DocsCorp contentCrawler
- Trumpet Symphony OCR

Scanner Settings

- **Dots Per Inch (DPI)**
  - Resolution
  - ↑ = Higher Quality
  - ↑ = Large Files

- **Color Mode**
  - Black & white
  - Grayscale
  - Color
Dots Per Inch

Sample 3 Page Scanned PDF

<table>
<thead>
<tr>
<th>Name</th>
<th>Size</th>
</tr>
</thead>
<tbody>
<tr>
<td>B&amp;W 300 dpi.pdf</td>
<td>195 KB</td>
</tr>
<tr>
<td>B&amp;W 400 dpi.pdf</td>
<td>264 KB</td>
</tr>
<tr>
<td>B&amp;W 600 dpi.pdf</td>
<td>398 KB</td>
</tr>
<tr>
<td>Color 150 dpi.pdf</td>
<td>796 KB</td>
</tr>
<tr>
<td>Color 200 dpi.pdf</td>
<td>1,201 KB</td>
</tr>
<tr>
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<td>2,030 KB</td>
</tr>
<tr>
<td>Color 600 dpi.pdf</td>
<td>5,029 KB</td>
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<td>Gray Scale 200 dpi.pdf</td>
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<td>Gray Scale 300 dpi.pdf</td>
<td>1,908 KB</td>
</tr>
<tr>
<td>Gray Scale 500 dpi.pdf</td>
<td>4,485 KB</td>
</tr>
</tbody>
</table>

STEP 4:

Search Program
or
Document Management System
Windows Search Software

- Copernic Desktop Search Professional - $56/yr
- X1 Search - $67/yr
- dtSearch - $199
- Windows Vista/7/8/10 Instant Search
- Filehand

Mac Search Software

- Spotlight Search (Mac OSX)
- EasyFind: Free
- HoudahSpot: $30
DMS Features

- Handles all document types
- Full text searching
- Forced user compliance
- Email integration
- Security
- Check in/check out
- Version tracking & audit trail
- Integration with word processor
- Auto archive
- Remote access

Players

- Worldox GX
- iManage WorkSite
- NetDocuments
- OpenText
- LaserFiche
STEP 5: If No DMS

- Consolidate folder structure
- Use consistent file naming convention
File Naming Conventions

▶ Not Recommended:
  ▶ wjcpc01.dep
  ▶ Joesmithltr.docx

▶ Recommended:
  ▶ 2004-10-30 - Jake Robbins Perjury Case Deposition 01.docx
  ▶ 2010-06-07 - Deed for 10011 184 St NW.docx
STEP 6: Digitize Everything

Electronic Filing System

Must hold:
- Documents created internally
- Documents received
- Email
- Email attachments
- Faxes
- Notes
Make your **active file digital**
(don’t wait until it’s over to scan)

- Consider Internet fax service
  - www.ringcentral.com
  - www.myfax.com
  - www.efax.com
  - www.greenfax.com
  - www.onebox.com
  - www.faxzero.com

- Don’t scan *everything*
- Distribute mail and let users scan
STEP 7: Email Stored Outside Email Program

How to save an email to PDF

Store Email Outside of Email App

- STOP PRINTING email

- Save as MSG or PDF files – or store them in a document management system
If you use Outlook

Then you need one of these
- Adobe Acrobat
- Nuance Power PDF Advanced
- Foxit PhantomPDF Business
- Nitro Pro

STEP 8: Collaborative Tools
File Sharing Tools

- ShareFile
- Dropbox
- Box
- SpiderOak
- SharePoint
- Google Drive
- OneDrive for Business

Many Case Management Systems Have Portals

- For example Clio Connect
STEP 9: Write it Down & Get Trained

Include all staff – even those who don’t think they’ll scan (they’ll change their minds)

Most important step

Breaks down resistance
Develop Protocols

▶ Write down how you do it
▶ Should be part of your employee manual

Now that you have an **electronic filing system**,

**RELY ON IT!**
Incredibly Inexpensive Storage

- 1 page of a PDF document = roughly 30 kilobytes
- 1 gigabyte = 1,073,741,824 bytes or 35,791 pages of text
- 1 bankers box holds about 2,500 pages
- 1 gigabyte can store 14.3 banker’s boxes of documents (so let’s round down to 14)
- 3 TB USB external hard drive = $90
- Therefore, a single drive could hold 42,000 bankers boxes of documents at a cost of $0.0021 per box.

Problems Solved

- Remote access
- Electronic files always in the same place
- Lower operating costs
- Electronic files are easily searchable
- Easy to share & collaborate
- Easily transportable
- Instant data access
- Easy updating
- No storage costs.
ACCESSING FILES REMOTELY

3 Basic Approaches

- Sync files to laptop
  - Dropbox
  - box
  - ShareFile

- Cloud sharing or access
  - SharePoint

- Connect to office server or PC
  - GoToMyPC
  - Network Attached Storage
  - VPN
HARDWARE CONSIDERATIONS

Two Basic Options

- PC you can take with you

- Home PC used to remotely access office systems
  (these must be secure from family members)
You Want An **Ultrabook** Configuration

- Resume from hibernation < 3 seconds
- Battery life > 6 hours of video
- USB 3.0, USB-C or Thunderbolt ports
- < 0.83" thick
- < 3 lbs.
- Powerful
- **Touch**
- Antivirus
- Anti-theft
- Hardware security

For example:
Dell XPS 13 in Frost White

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**2 in 1 Convertible**

Hybrid tablet/laptop
Tablet

Laptop + Dock + Monitors + Keyboard/Mouse
You Can’t Assume Everyone Has A Home PC

▶ If everyone in your office has a desktop, they may not be able to work at home

▶ This is not very portable!

▶ Might be time to consider laptops for everyone

Laptop Configuration Recommendation

▶ 13.3”, 14” or 15.6” touch screen – smaller = lighter laptop
▶ 16 GB of RAM (32 OK, 8 not OK)
▶ 500 GB or 1,000 GB (1 TB) solid state hard drive
▶ Backlit keyboard
▶ Biometric/fingerprint reader built in
▶ Windows 10 Pro (not Home) or Mac OSX
▶ 3 year, next business day, on-site warranty + accidental damage protection
▶ Intel i5 or i7 processor – 8th, 9th, or 10th gen
Deciphering Intel Processors

- i3 – i5 – i7 – i9: speed/power increments

- Generation: current is 10th – how to tell
  - Intel Core i7-10710U – 10th gen
  - Intel Core i7-9750H – 9th gen

- Power Consumption:
  - Intel Core i7-9750H – High performance graphics, uses more juice
  - Intel Core i7-10710U – Ultra low power consumption (most are here)
  - Intel Core i7-10310Y – Extremely low power consumption (uncommon)

- For a full explanation, see https://intel.ly/2JgoHoQ

Keyboard/Mouse Combo for Dock

External keyboard/mouse combo MK550 or MK710

1. Customizable keys
2. Comfort wave keyframe
3. Cushioned palm rest
* May vary based on user and computing conditions.
4. Extended life battery*
5. Ambidextrous laser mouse
6. USB Receiver included
Best Travel Mice

- Logitech MX Master - $60
- Logitech Anywhere Mouse MX - $35

On Premises File Servers

Got one of these in your office?

- Question whether you not it
- They’re very expensive to maintain
- Remote access is typically poor
The benefits of a server:

- Centralized file storage
- Centralized database storage
- Reliability
- Security
- Remote access
- Centralized backup
- High performance

Can you get all of those things without a server?

Yes

So don’t get scared into buying one by an IT company – get a second opinion

Unless you’re doing pretty basic stuff, an iPad probably won’t cut it

However, the tradeoff between a 2-in-1 PC and a tablet is negligible
Portable Printers

- HP OfficeJet 200
- HP OfficeJet 250 All-in-One (print, copy, scan)
- Canon Pixma iP110v

Portable Scanners

- Fujitsu ScanSnap S1300i
- Fujitsu ScanSnap iX100
Multifunction versus separate scanner & printer

Less money versus longer life & better performance

Portable Postage & Label Printer

DYMO Label Printer & Digital Scale - $218
DYMO 450 Twin Turbo (no scale) - $135
Portable Optical Drive/DVD

- Smaller & lighter = no drive
- External USB DVD player/recorder external drive = $30
Cell phones aren’t the best option

Hosted Voice Over Internet Protocol (VoIP) is a GREAT option

<table>
<thead>
<tr>
<th>Laptop</th>
<th>+</th>
<th>Savi Office W730</th>
<th>+</th>
<th>Voyager-5200</th>
</tr>
</thead>
</table>

You Must Have A Web Meeting Service

- GoToMeeting
- WebEx MeetMeNow
- Adobe Connect
- Microsoft Teams
- Join.Me
- Zoom

https://www.affinityconsulting.com/comparewebmeetings/
Better Webcams & Portable Video Conferencing

- Better Webcams (super high demand right now so prices are high)
  - Logitech C920 HD – list price $80
  - Logitech C930e – list price $130
  - Logitech Brio Ultra Pro – list price $199

- Complete portable video conferencing system – Logitech Group Video Conference bundle – list $1,300

Instant Messaging Can Be Very Important

Instant messaging with Microsoft Teams

Keep the team connected no matter where work takes you with Microsoft Teams
To find options, web search the phrase **virtual receptionist**

![RUBY Receptionists Logo](image1)

**Professional Answering Service**

![Smith Website Banner](image2)

**Virtual In/Out Boards**

Want to save time, organize employees, and always be in the know?

- [www.simpleinout.com](http://www.simpleinout.com)
- [www.virtualinout.com](http://www.virtualinout.com)

**Team Movements Simplified**

Virtual In/Out provides your employees and visitors with a simple way to sign in and out of any location.
GETTING DOCUMENTS SIGNED

Electronic and Remote Notarization

ANNOUNCING APPROVED ELECTRONIC AND REMOTE NOTARIZATION VENDORS!

Michigan amended its notary law in 2018 to be in line with other states that have authorized electronic and remote notarizations. To do this, the Secretary of State was authorized with the assistance of the Department of Management and Budget to allow vendor systems to be used in Michigan to conduct electronic and remote notarizations.

As required, the Department of State is working to implement these new systems and is pleased to announce five (5) vendor system approvals. The approvals are effective immediately and Notaries can contract with their selected vendor, which will require a few links to each vendor are provided below for you to begin your research should you choose to purchase any or all of these systems. Their use is optional and no action is needed on your part to continue performing traditional pen and paper notarizations. (Please do not contact our office with questions concerning the systems capabilities, cost, training or other similar questions; all questions must be directed to the vendors themselves.)

- E-Mortgage Law - Offers electronic notarizations services
- Nexsys - Offers both electronic and remote notarization services
- Pano - Offers both electronic and remote notarization services
- NotaryCam - Offers both electronic and remote notarization services
- Notarize - Offers electronic and remote notarization services

Because only approved vendor systems can be used in Michigan a Notary wishing to provide these services must use the vendors above. Use this Guide to help to understand the new options, how to update commission information and how the work of Notaries is affected.

Note: The Department of State does not provide access, training or dictate costs of these newly approved systems.
MI Executive Order No 2020-41

- Download the order here:  https://tinyurl.com/vbglkah
- Encourages electronic signatures & relaxes compliance with:
  - Uniform Electronic Transactions Act (“UETA”)
  - Uniform Real Property Electronic Recording Act (“URPERA”)
- Explains process for any MI notary to render service using “two-way real-time audiovisual technology.”

Digital Signatures

- DocuSign:  www.docusign.com
- RightSignature: (our favorite) www.rightsignature.com
Digital Signatures

- eSign: www.adobe.com/esign
- OneSpan: www.esignlive.com
- Hellosign: www.hellosign.com

SECURITY & PROTECTING CLIENT DATA
When transmitting a communication that contains confidential and/or privileged information relating to the representation of a client, the lawyer should take reasonable measures and act competently so that the confidential and/or privileged client information will not be revealed to unintended third parties.

Your Security Portfolio

- Laptop, tablet & phone encryption
  - Windows 10 Pro – Bitlocker
  - Mac – FileVault

- Email encryption – for example rmail.com

- Home router encryption – WPA2 or WPA3 (not ok to use WEP) & change your default admin password

- VPN service – for example NordVPN
You Need A Password Manager

▶ Part of your estate plan – makes it sharable
▶ Way too many passwords and logons to keep track of
▶ They generate strong passwords
▶ You’re using the same password for many logons
▶ Holds credit cards
▶ Holds any kind of personal info

Options

▶ Dashlane
▶ LastPass
▶ Sticky Password
▶ LogMeOnce
▶ 1Password
▶ TrueKey
▶ RoboForm
▶ Keeper Desktop
**Encrypted Flash Drives**

- Kingston DataTraveler 4000
- Aegis Secure Key
- CMS Secure Vault FIPS

**Encrypted External Drives**

- Lenovo ThinkPad USB 3.0 Secure Hard Drive
- Aegis Padlock
- iStorage 3 TB encrypted hard drive
Enable Two Factor Authentication (2FA)

Requires 2 authentication factors to verify identity
- Knowledge factors – something you know
- Possession factors – ID card, security token or smartphone
- Inherence factors - biometrics

Required Policies
- Internet use
- Social media
- Document retention
- Secure password – 12 characters, mixed case, at least 1 number & 1 symbol
- Disaster recovery plan
- Mobile security
If Using Home Devices

- Make sure antivirus up to date
- Operating system updates have been installed
- Other family members should not have access
- Make sure WiFi is secure

Mobile Backup For Your Laptop

- Carbonite
- iBackup
- CrashPlan
- SOS Online Backup
- iDrive
- BackBlaze
Backup on a Budget

- **Carbonite Personal Plus**
  - $72/PC/yr – unlimited storage

- **WD 3TB My Book Desktop External Hard Drive**
  - $89

- **Acronis True Image 2020**
  - $35

Security & Accessories

**3M Computer Privacy Screens**
If You’ve Resisted, It’s Time To Embrace The Cloud
If You’ve Resisted, It’s Time To Embrace The Cloud

Software as a Service (SaaS)

Infrastructure as a Service (IaaS) aka “hosted servers”

Cloud Examples

- Email
- Dropbox/Box/OneDrive/Google Drive
- ShareFile
- QuickBooks Online or Xero
- Web-based case management
- Web-based accounting
- Office 365 or G Suite
- Carbonite or Mozy online backup
- Hosted servers
- Electronic case filing
And the point is:

You can’t avoid

Consider Cloud Case Management & Accounting

[Logos of various cloud-based software tools]
Case Management Software

It takes your calendar, your task list, and your contact list...

Case Management Software

...adds other critical practice information like...

Communication and Time Entries
Case Management Software

... and organizes it all by matter

It works the way you work, it thinks the way you think.
Then, it brings in many other elements to help manage your practice…
If a lawyer leaves, can you...
- Produce his/her case list?
- Re-create a case history?
- Find all email related to a case?
- Find all documents related to a case?
- Determine status of a case?

If not, you have a problem

If something happens to you, can others...
- Produce your case list?
- Re-create a case history?
- Find all email related to a case?
- Find all documents related to a case?
- Determine status of a case?

If not, you have a problem
Cloud Accounting Only Options

- QuickBooks Online
- Xero
- Bill4Time
- Legal Billing
- Toggl
- FreshBooks
- Timesolv Legal
- Case management options

If You Have Office 365, Then Use More Of It
Try To Be Self Reliant With Drafting

We all have remote access to our computers from home, but for many court filings we still need to submit them in paper. I haven’t figured out how to get all the letters, envelopes, and copies prepared without being in the office with my secretary.
Templates Are Critical

[CONFIDENTIALITY AND NON-DISCLOSURE AGREEMENT]

Opening Commentary: If the agreement is one way, then we define the Discloser and Recipient in the opening paragraph. If the agreement is mutual, then we do not need to define or abbreviate our party names, because they will only be specified four times – in the opening, in the notice section, in the signature, and in the joinder.

This [mutual] confidentiality and non-disclosure agreement is dated [Month Day, Year] and is between [_____], identify type of entity [Delete if Mutual (“Discloser”), and [_____], identify type of entity [Delete if Mutual (“Recipient”).]

Background Commentary: The idea here is that if we have a mutual agreement, we are going to establish a setup where either party could be a discloser or a recipient depending on who discloses the information and who receives the information. If it is a one way agreement then we define discloser and recipient in the opening.

The parties wish to explore a business opportunity of mutual interest involving [describe what is going on: sale of business, product development, consulting arrangement, joint venture, etc.] (“Business Opportunity”). [USE THIS LANGUAGE FOR A ONE-WAY AGREEMENT: In connection with the Business Opportunity, Discloser may disclose to Recipient, and Recipient may have access to, certain information that Discloser desires Recipient to treat as confidential. Recipient agrees to the terms herein in order to induce Discloser to disclose the information.] [USE THIS LANGUAGE FOR A MUTUAL AGREEMENT: In connection with the Business Opportunity, each party may disclose to the other, and each party may have access to, certain information that the party disclosing (“Discloser”) desires the receiving party (“Recipient”) to treat as confidential. Each of the parties may be considered a Discloser in one instance and a Recipient in another instance, based upon which party is provided or obtaining information. The parties are entering into this agreement in order to induce one another to disclose confidential information to enable them to explore the Business Opportunity.]

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CONFIDENTIAL RETIREMENT AGREEMENT AND GENERAL RELEASE

This confidential agreement and general release is between the University of Higher Education and [_____].

University and [_____] mutually agree to conclude their employer-employee relationship in an amicable manner and agree as follows:

1. Retirement date. Mr. [_____] voluntarily retires from his position as effective (“retirement date”). Mr. [_____] shall continue to perform his duties as a faculty member in good faith until [_____]. After his retirement date, neither party has any obligation to the other, except as described below.

2. Payment in exchange for promises. University shall provide the following compensation and benefits to Mr. [_____] (all of which may not otherwise be due to him) in exchange for his promises and subject to the conditions in this agreement.

3. No other payments due. Mr. [_____] confirms that no other payments are due and owing to him.
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HOME WORKSPACE

Short List

- Paper & electronic files must be secure
- It’s worth getting another docking station, monitors, keyboard & mouse for home
- If you’re used to dual/triple monitors at the office, you’ll need them for home
- Might be time to upgrade your internet access at home
Thank You!

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