As a Law Practice Tool

State Bar of Michigan
Webinar, April 12, 2018

Heidi Alexander

- Deputy Director, Lawyers Concerned for Lawyers
- Former practicing attorney
- Expert in law office management and technology
- Member, ABA TECHSHOW Planning Board
- Member, SJC Standing Committee on Professionalism
- Author, *Evernote as a Law Practice Tool*

Ever felt like . . .

Insufficient Systems

When your environment is cluttered, the chaos restricts your ability to focus.

Princeton University Neuroscience Institute 2011

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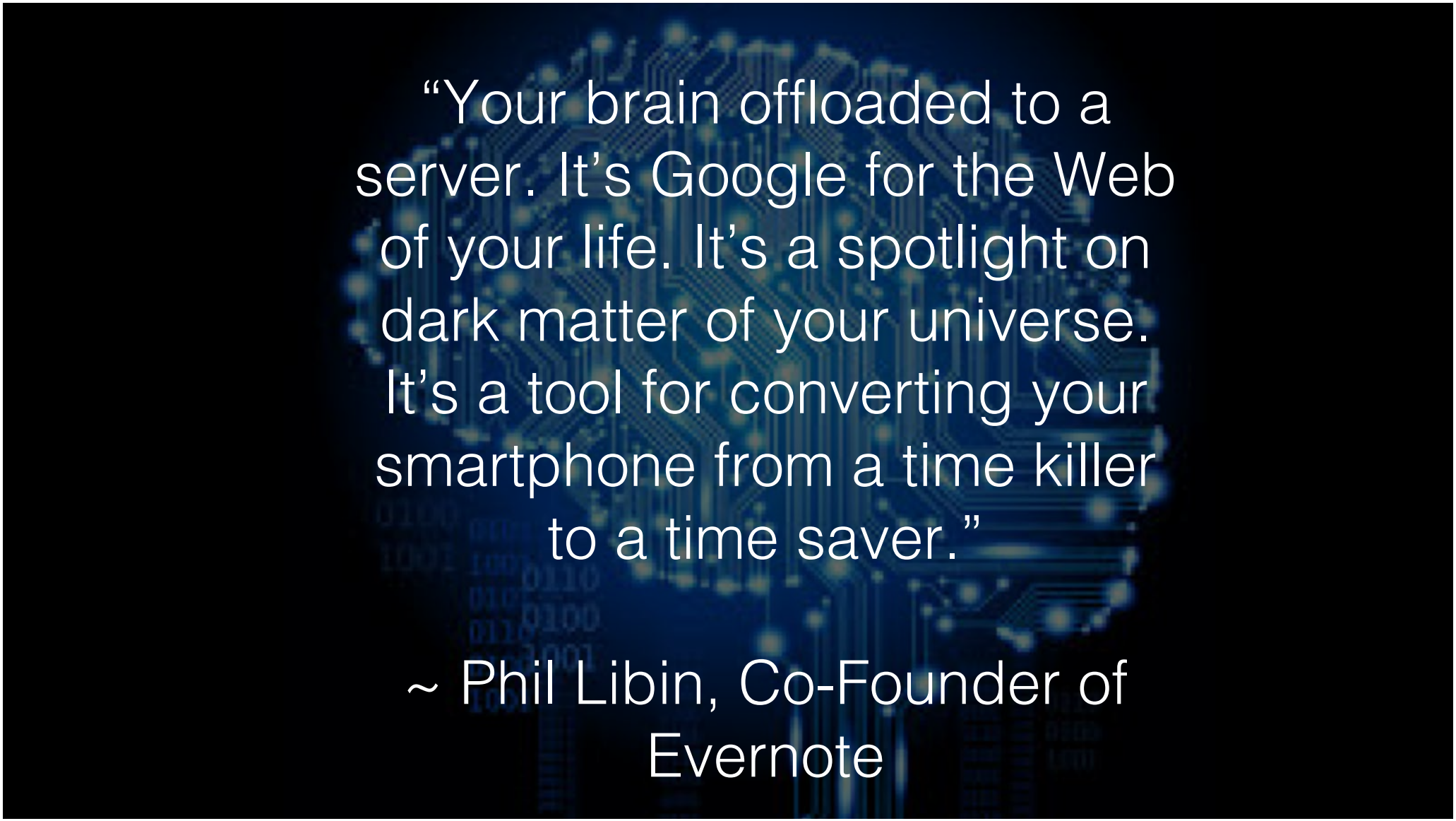
The Answer . . .


“Your brain offloaded to a server. It’s Google for the Web of your 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.”
~ Phil Libin, Co-Founder of Evernote

The Big Four

Google Keep v. Apple Notes

- Free
- Web, iOS, Android
- Save content from the web
- Save photos and audio
- Labels

- Free
- Mac and iOS only
- Save content from the web
- Save photos, audio, handwriting
- Lock down notes

Evernote v. OneNote

- Free + premium options
- Search heavy

- Free (mostly)
- Better analogy to paper notebook

- Save photos and audio
- Labels

- Save photos, audio, handwriting
- Lock down notes

Devices

- Android
- Apple
- Blackberry
- Windows
- Web

https://help.evernote.com/hc/en-us/articles/209005157

Pricing

- Basic = Free
- Plus = $24.99/yr
- Premium = $49.99/yr
- Premium for Business = $12/user/mo

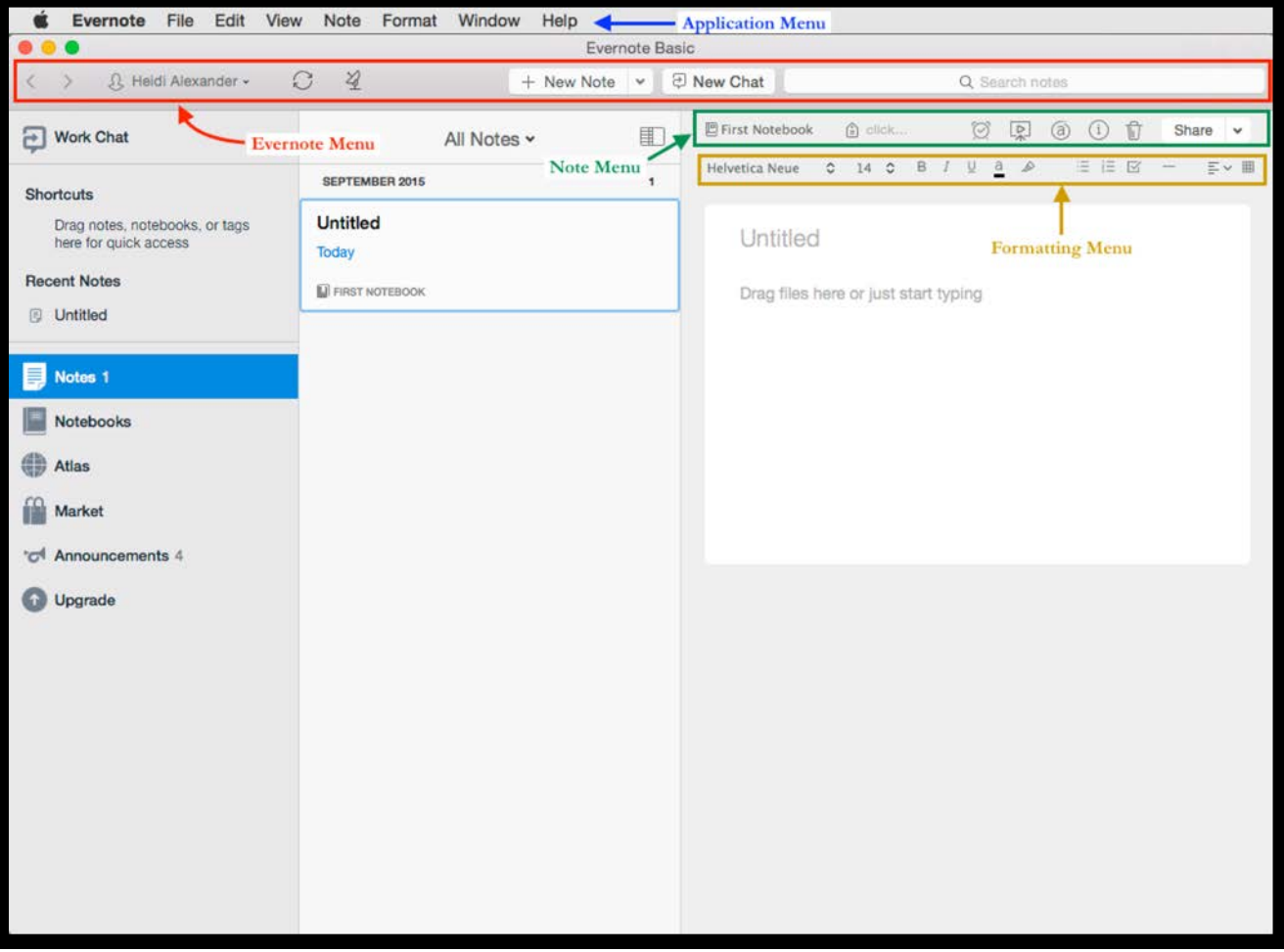
https://evernote.com/pricing/

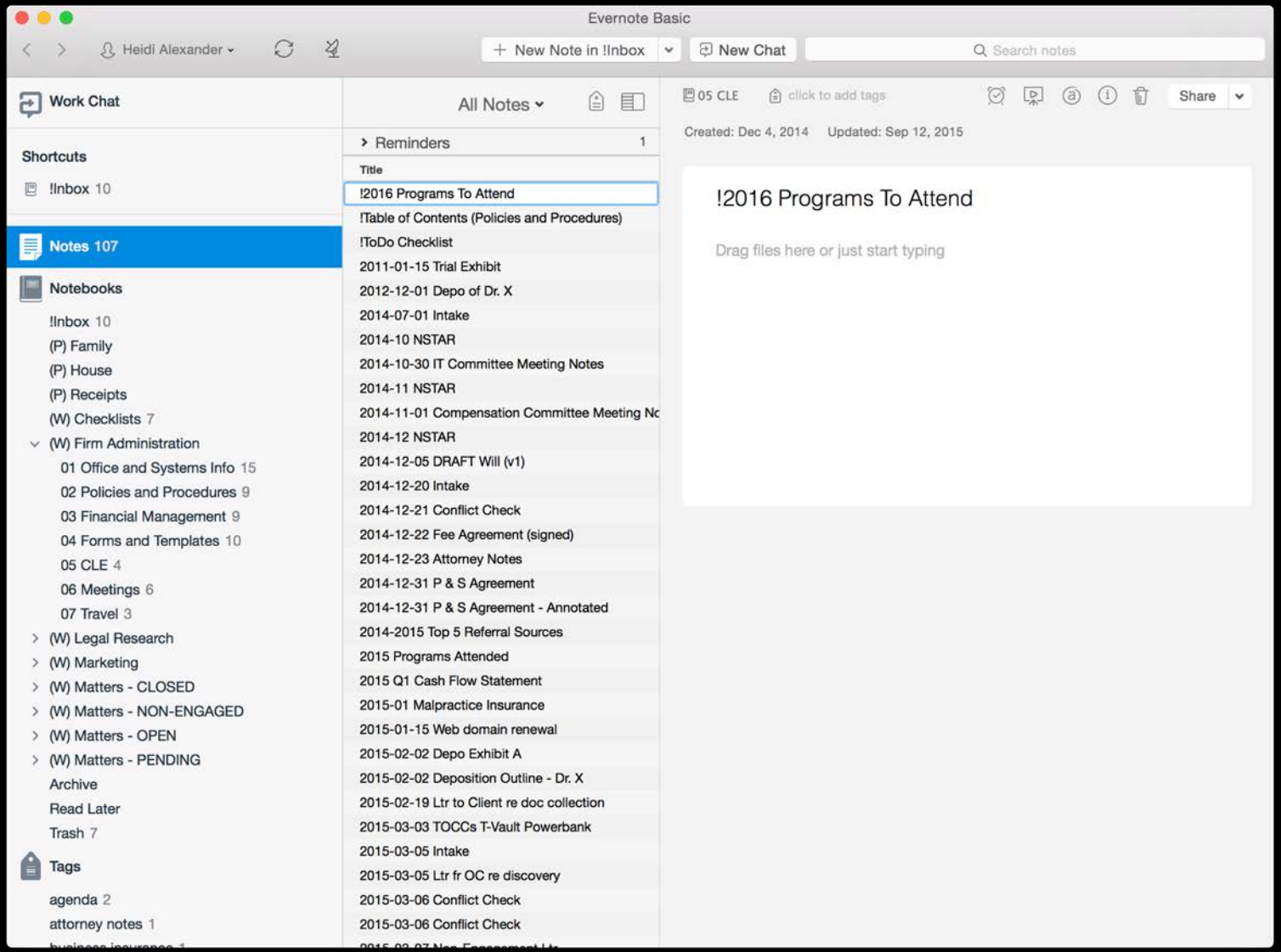
Agenda

- What is Inside?
- What Can It Do?
- How Can Attorneys Use It?
- Is It Secure?

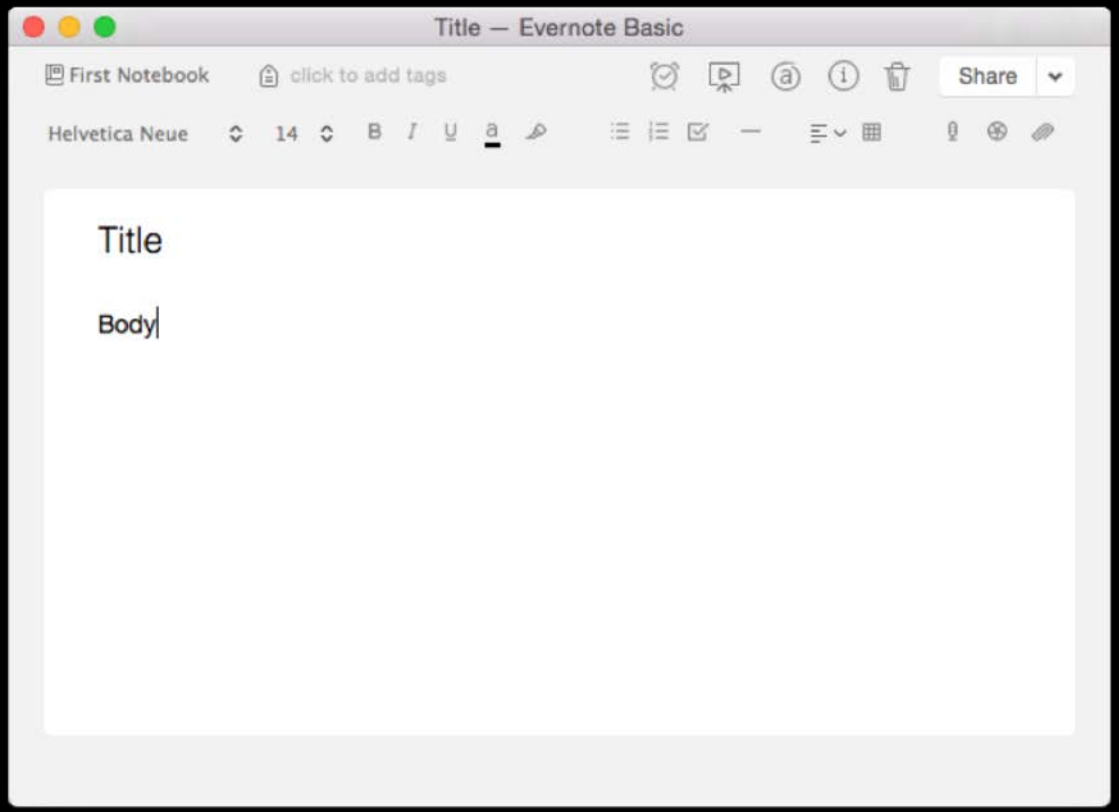
What is Inside?

Workspace


Evernote File Edit View Note Format Window Help
Application Menu
Evernote Basic
Heidi Alexander
New Note
New Chat
Search notes
Work Chat
Evernote Menu
All Notes
Note Menu
First Notebook
click...
Share
Helvetica Neue
14
Shortcuts
Drag notes, notebooks, or tags here for quick access
Recent Notes
Untitled
SEPTEMBER 2015
Untitled
Today
FIRST NOTEBOOK
Untitled
Formatting Menu
Drag files here or just start typing
Notes 1
Notebooks
Atlas
Market
Announcements 4
Upgrade


Evernote Basic
Heidi Alexander
New Note in !Inbox
New Chat
Search notes
Work Chat
Shortcuts
!Inbox 10
Notes 107
Notebooks
!Inbox 10
(P) Family
(P) House
(P) Receipts
(W) Checklists 7
(W) Firm Administration
01 Office and Systems Info 15
02 Policies and Procedures 9
03 Financial Management 9
04 Forms and Templates 10
05 CLE 4
06 Meetings 6
07 Travel 3
(W) Legal Research
(W) Marketing
(W) Matters - CLOSED
(W) Matters - NON-ENGAGED
(W) Matters - OPEN
(W) Matters - PENDING
Archive
Read Later
Trash 7
Tags
agenda 2
attorney notes 1
All Notes
Reminders 1
Title
!2016 Programs To Attend
!Table of Contents (Policies and Procedures)
!ToDo Checklist
2011-01-15 Trial Exhibit
2012-12-01 Depo of Dr. X
2014-07-01 Intake
2014-10 NSTAR
2014-10-30 IT Committee Meeting Notes
2014-11 NSTAR
2014-11-01 Compensation Committee Meeting No
2014-12 NSTAR
2014-12-05 DRAFT Will (v1)
2014-12-20 Intake
2014-12-21 Conflict Check
2014-12-22 Fee Agreement (signed)
2014-12-23 Attorney Notes
2014-12-31 P & S Agreement
2014-12-31 P & S Agreement - Annotated
2014-2015 Top 5 Referral Sources
2015 Programs Attended
2015 Q1 Cash Flow Statement
2015-01 Malpractice Insurance
2015-01-15 Web domain renewal
2015-02-02 Depo Exhibit A
2015-02-02 Deposition Outline - Dr. X
2015-02-19 Ltr to Client re doc collection
2015-03-03 TOCCs T-Vault Powerbank
2015-03-05 Intake
2015-03-05 Ltr fr OC re discovery
2015-03-06 Conflict Check
2015-03-06 Conflict Check
05 CLE
click to add tags
Share
Created: Dec 4, 2014 Updated: Sep 12, 2015
!2016 Programs To Attend
Drag files here or just start typing

Notes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First Notebook
click to add tags
Share
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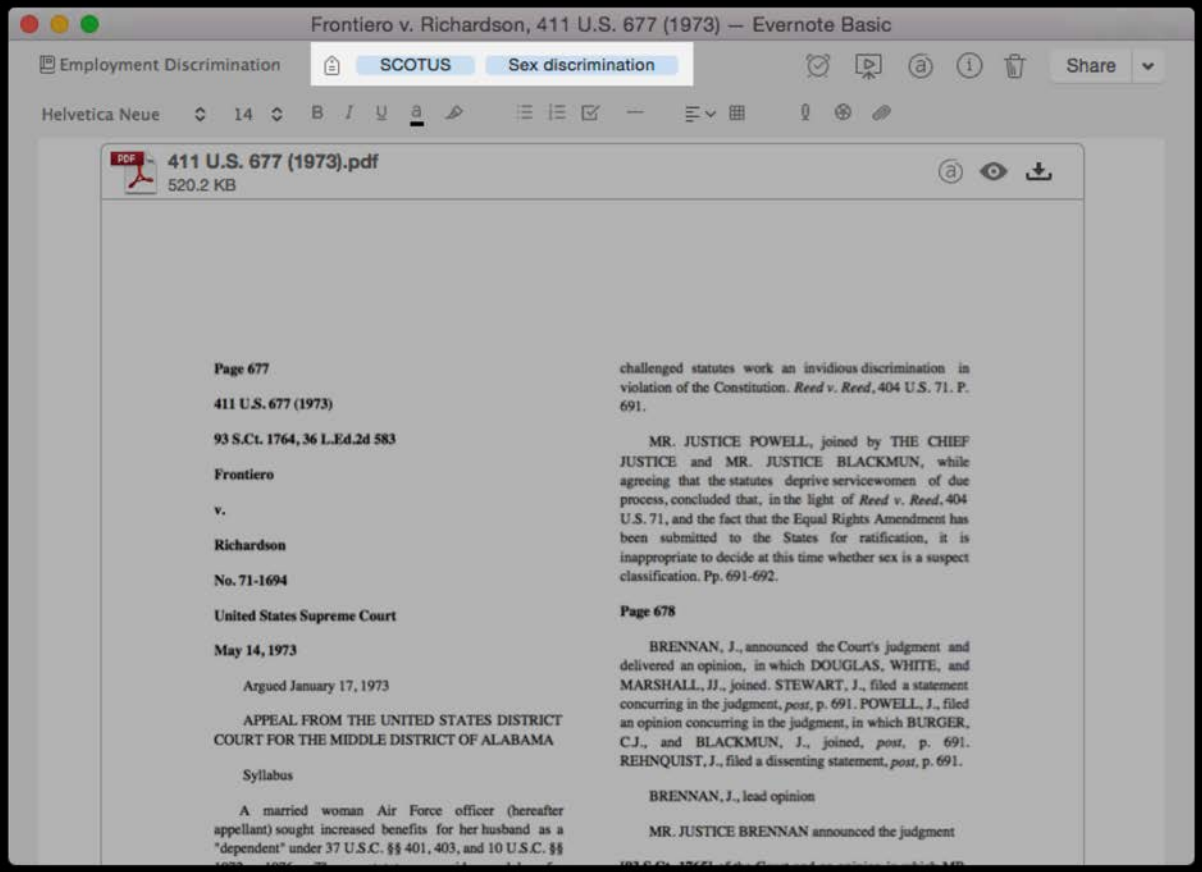
Title
Body

Tags


Frontiero v. Richardson, 411 U.S. 677 (1973) — Evernote Basic
Employment Discrimination
SCOTUS
Sex discrimination
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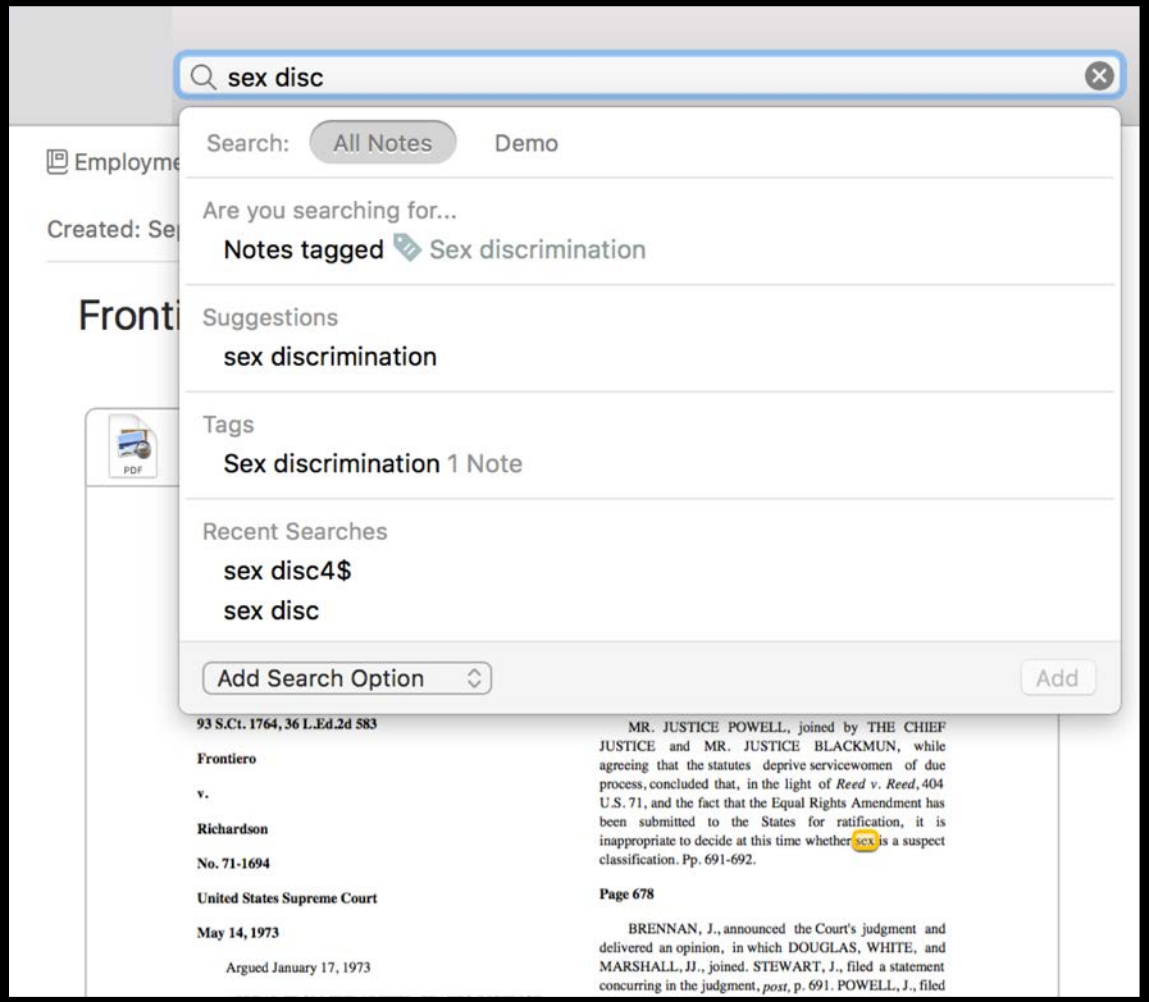
14
411 U.S. 677 (1973).pdf
520.2 KB
Page 677
411 U.S. 677 (1973)
93 S.Ct. 1764, 36 L.Ed.2d 583
Frontiero
v.
Richardson
No. 71-1694
United States Supreme Court
May 14, 1973
Argued January 17, 1973
APPEAL FROM THE UNITED STATES DISTRICT COURT FOR THE MIDDLE DISTRICT OF ALABAMA
Syllabus
A married woman Air Force officer (hereafter appellant) sought increased benefits for her husband as a "dependent" under 37 U.S.C. §§ 401, 403, and 10 U.S.C. §§
challenged statutes work an invidious discrimination in violation of the Constitution. Reed v. Reed, 404 U.S. 71. P. 691.
MR. JUSTICE POWELL, joined by THE CHIEF JUSTICE and MR. JUSTICE BLACKMUN, while agreeing that the statutes deprive servicewomen of due process, concluded that, in the light of Reed v. Reed, 404 U.S. 71, and the fact that the Equal Rights Amendment has been submitted to the States for ratification, it is inappropriate to decide at this time whether sex is a suspect classification. Pp. 691-692.
Page 678
BRENNAN, J., announced the Court's judgment and delivered an opinion, in which DOUGLAS, WHITE, and MARSHALL, JJ., joined. STEWART, J., filed a statement concurring in the judgment, post, p. 691. POWELL, J., filed an opinion concurring in the judgment, in which BURGER, C.J., and BLACKMUN, J., joined, post, p. 691. REHNQUIST, J., filed a dissenting statement, post, p. 691.
BRENNAN, J., lead opinion
MR. JUSTICE BRENNAN announced the judgment

Search

- Images and PDFs
- Globally
- Within specific Notes and Notebooks
- Tags
- Descriptive search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93 S.Ct. 1764, 36 L.Ed.2d 583
Frontiero
v.
Richardson
No. 71-1694
United States Supreme Court
May 14, 1973
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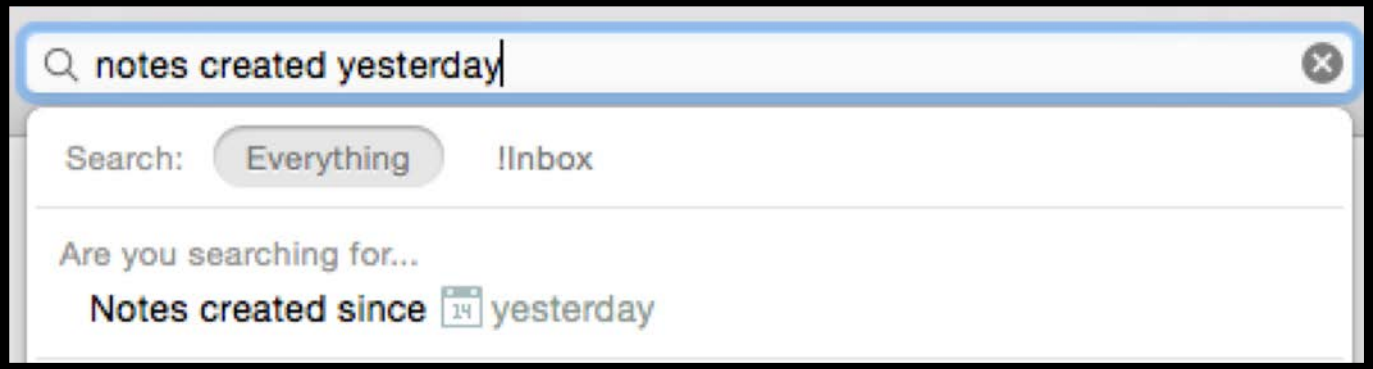
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Notes created since
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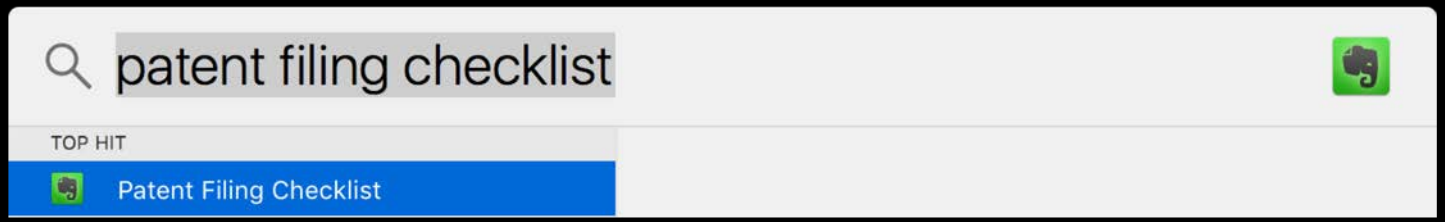
patent filing checklist
TOP HIT
Patent Filing Checklist

What Can It Do?

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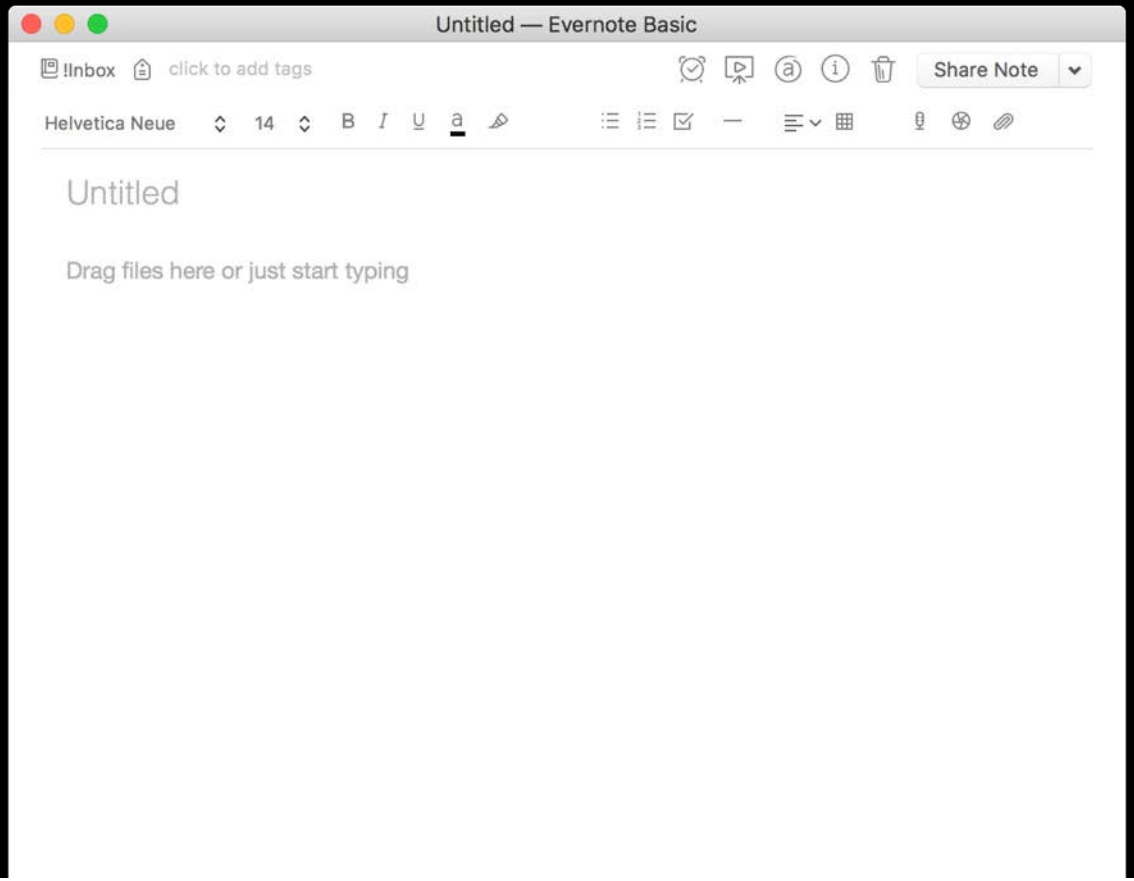
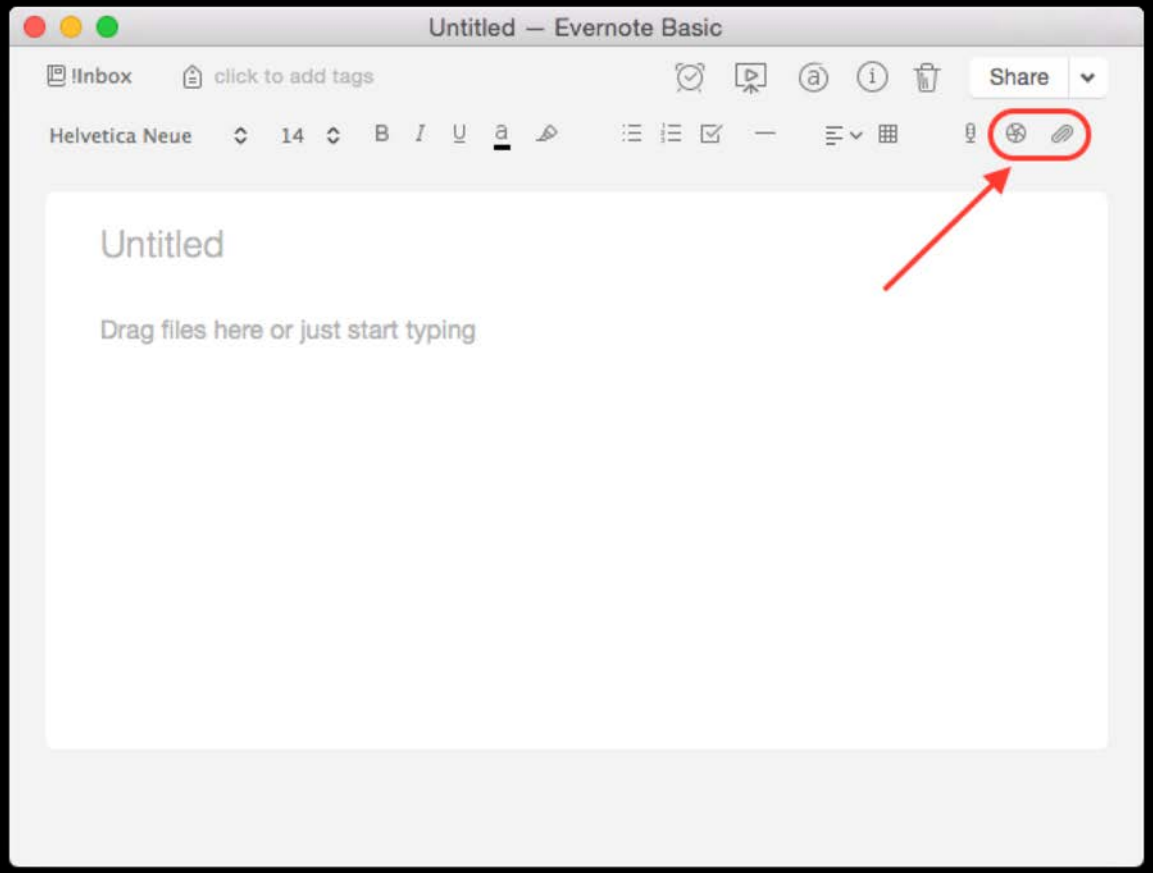
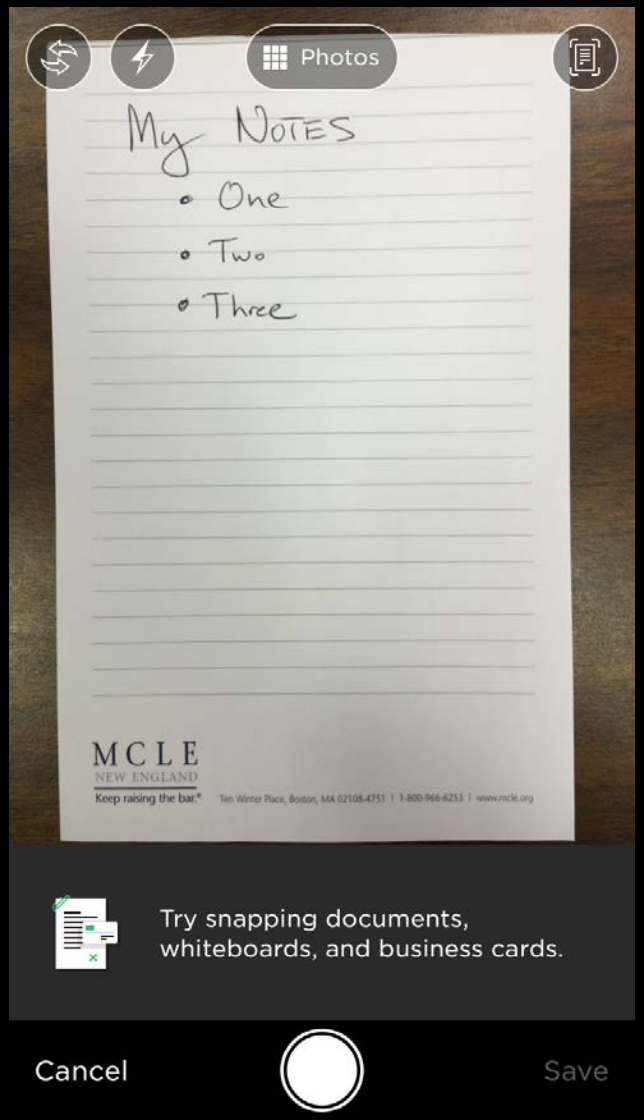


Documents and Images

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Three
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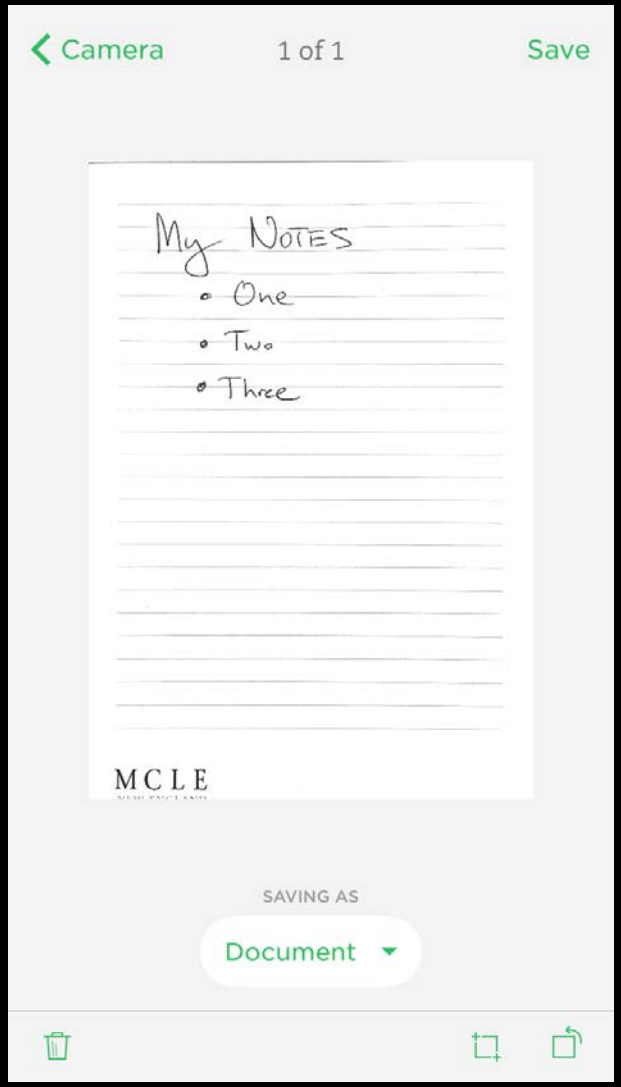
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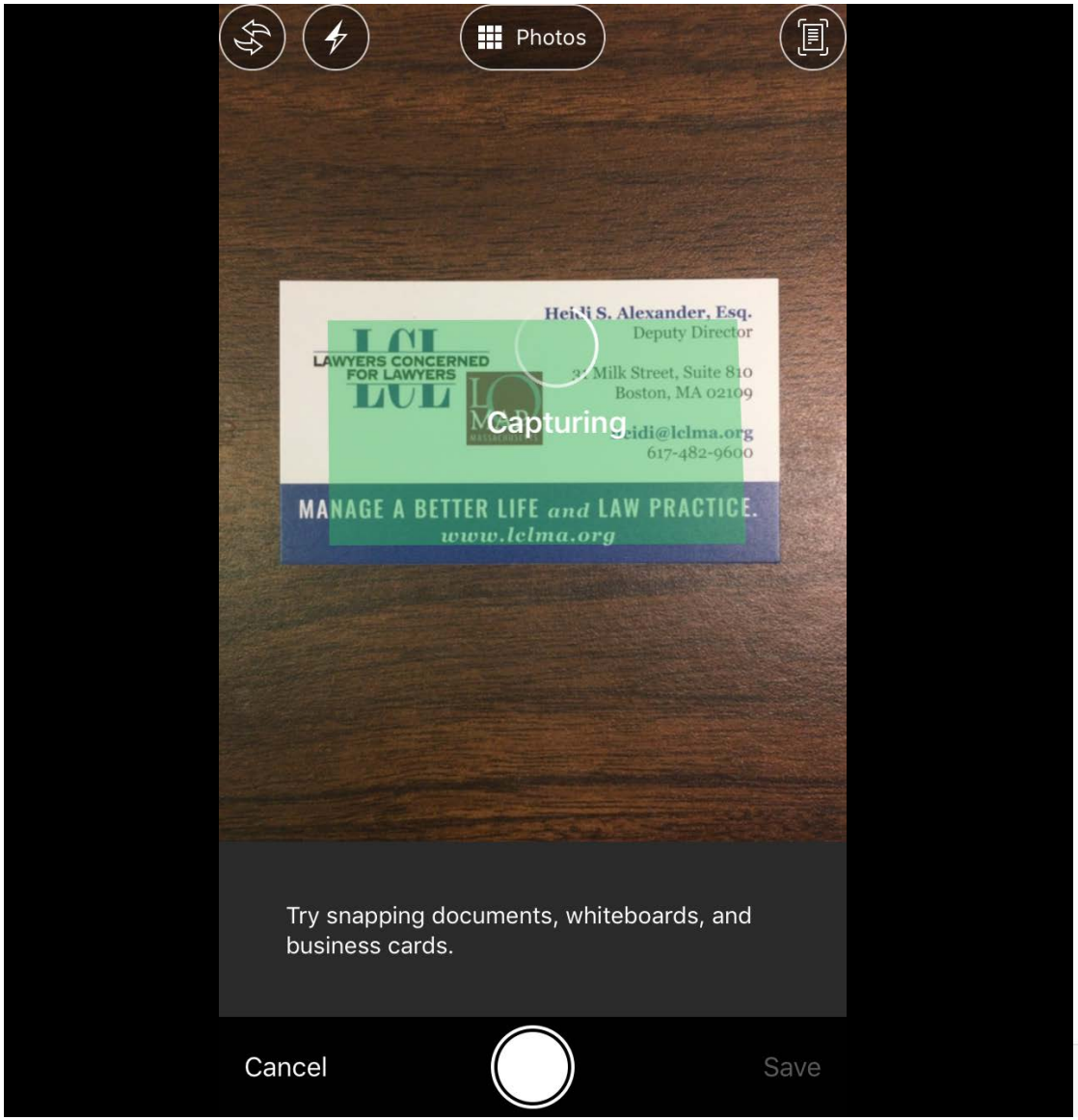
Photos
Capturing
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Deputy Director
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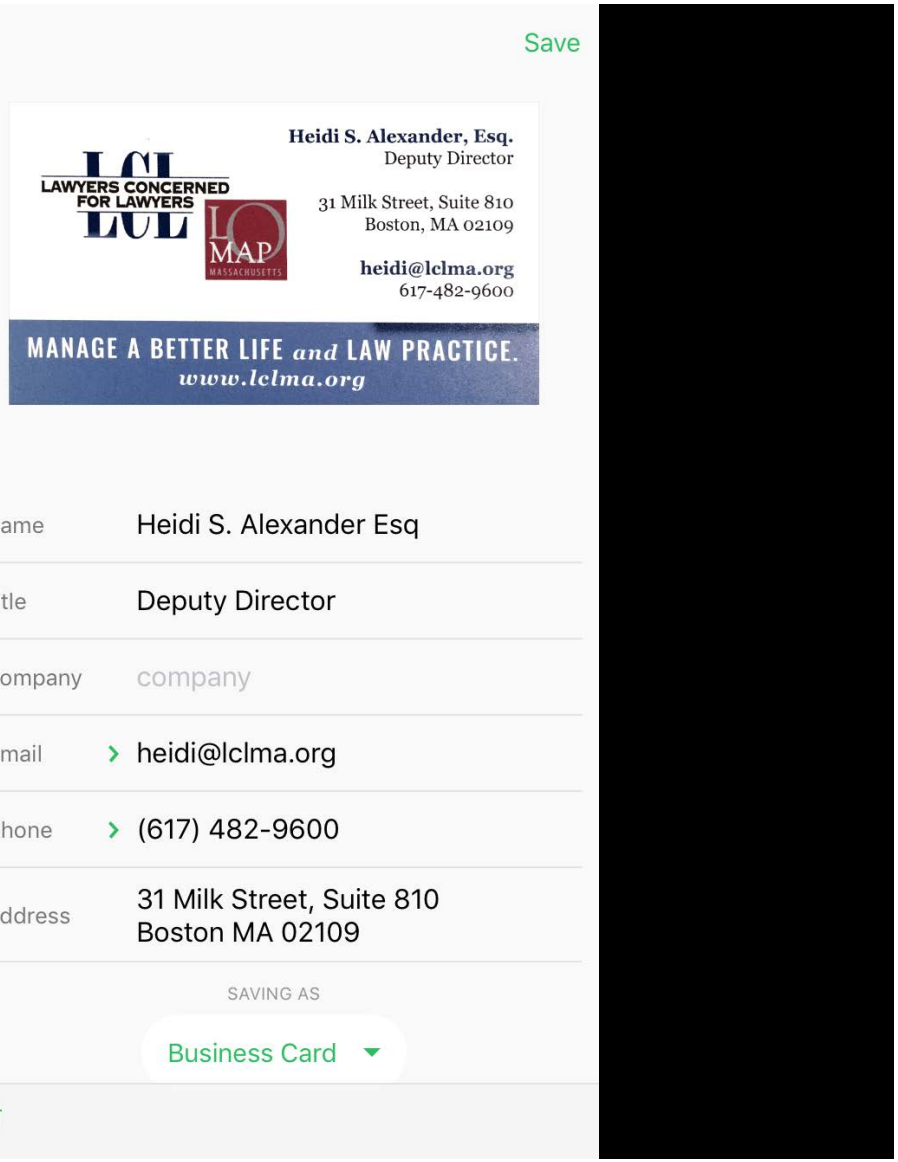
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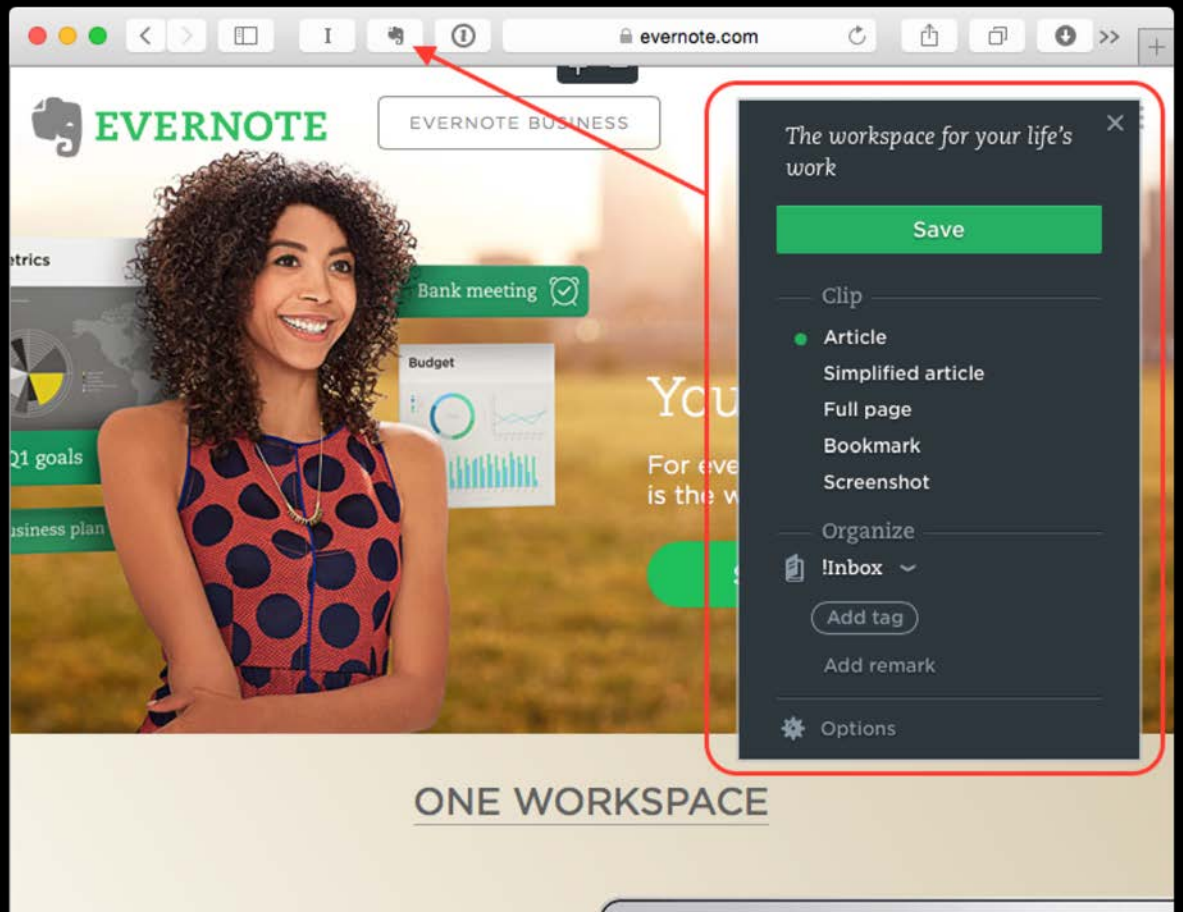
Business Card

From the Web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EVERNOTE
EVERNOTE BUSINESS
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Budget
Q1 goals
The workspace for your life's work
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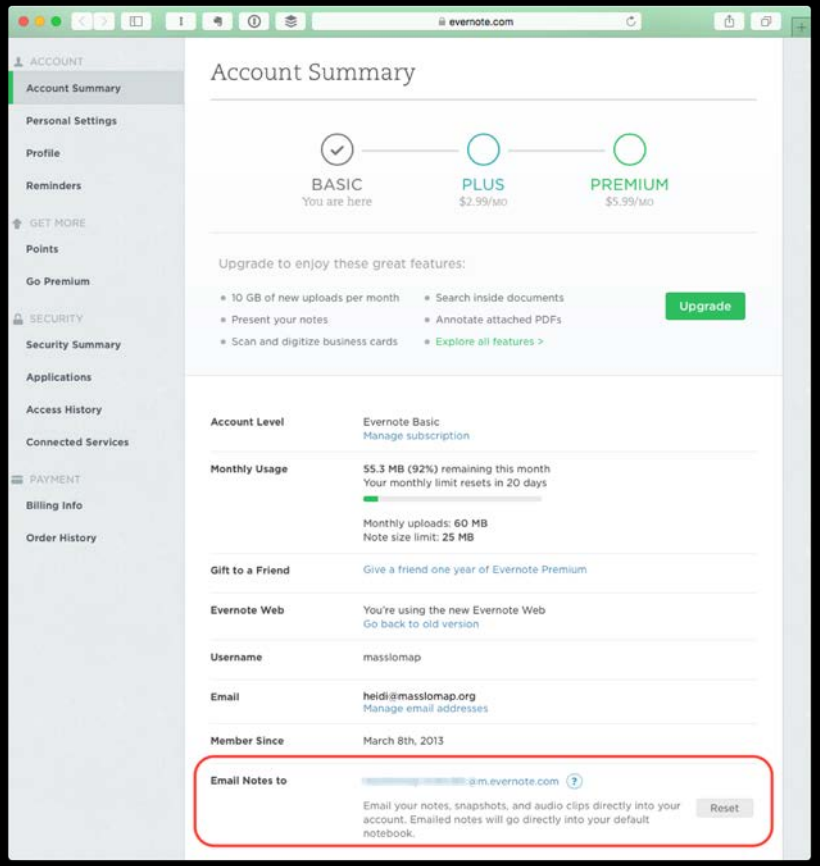
Clip
Article
Simplified article
Full page
Bookmark
Screenshot
Organize
!Inbox
Add tag
Add remark
Options
ONE WORKSPACE

From E-mail

- Evernote E-mail Address (Plus and Premium)
- Web Clipper (Gmail)
- Evernote Add-On for Outlook

Evernote E-mail Address



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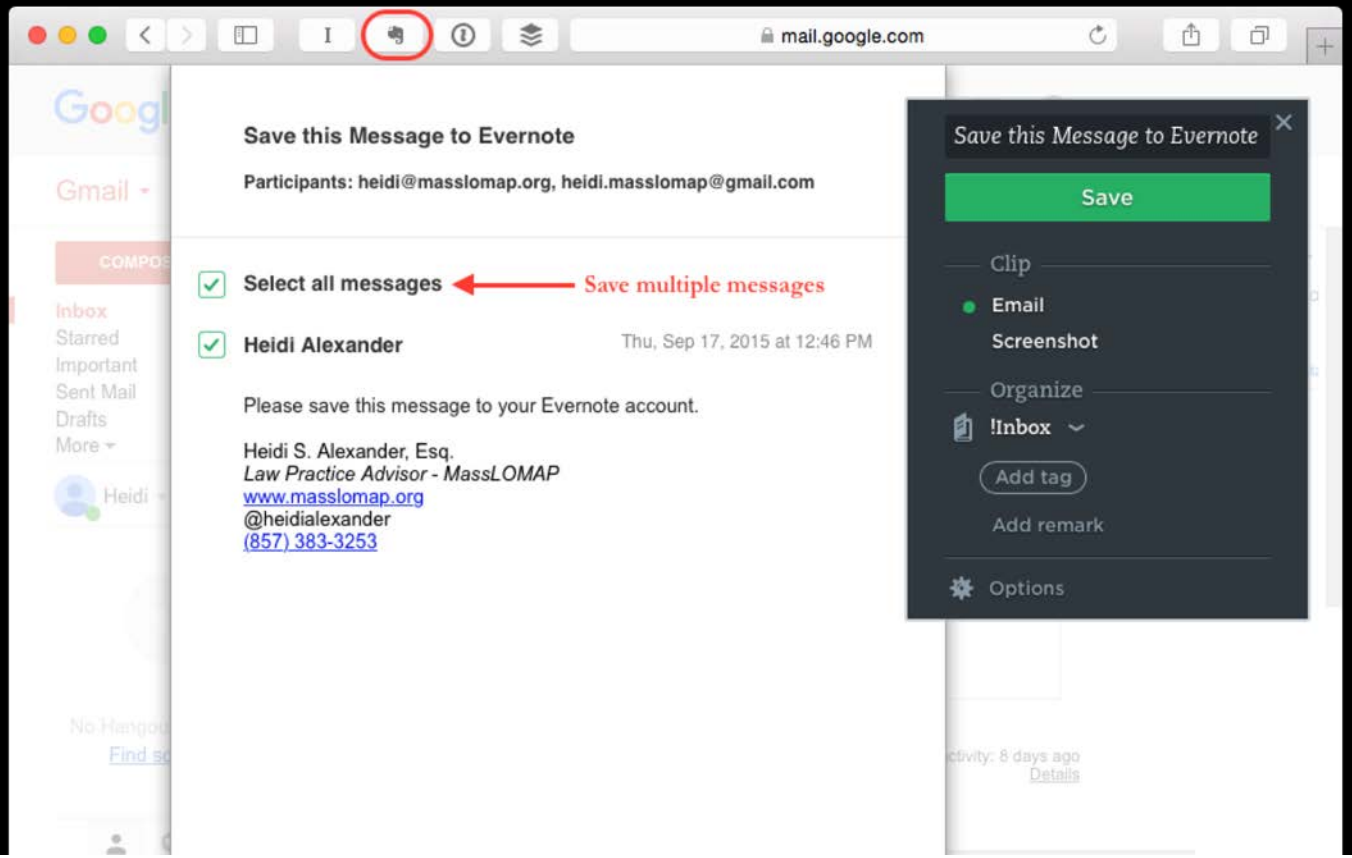

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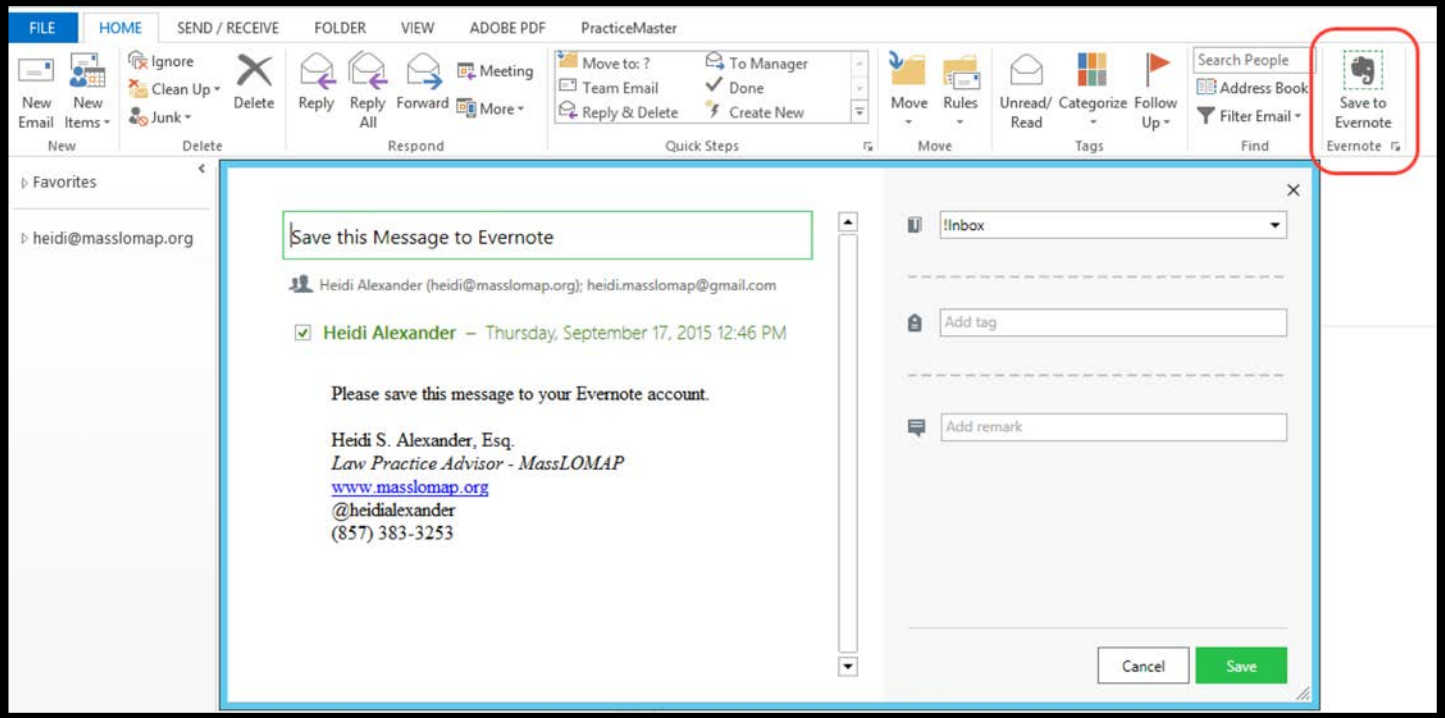
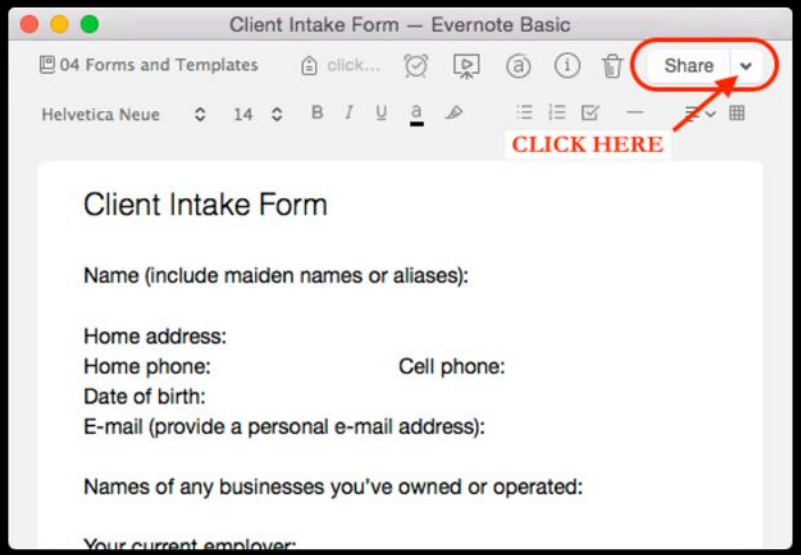
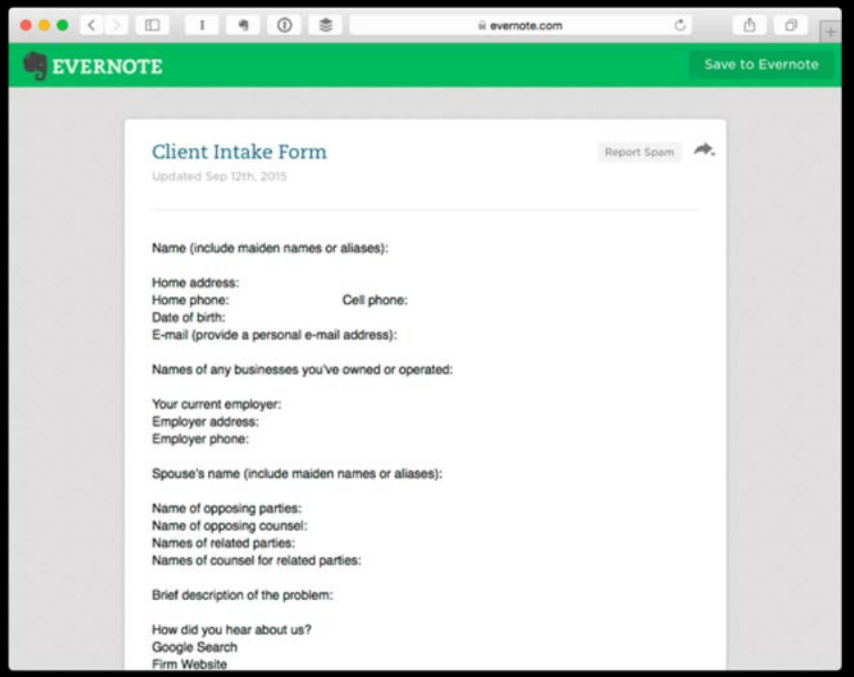


Share Content

Sharing via Public Note Link





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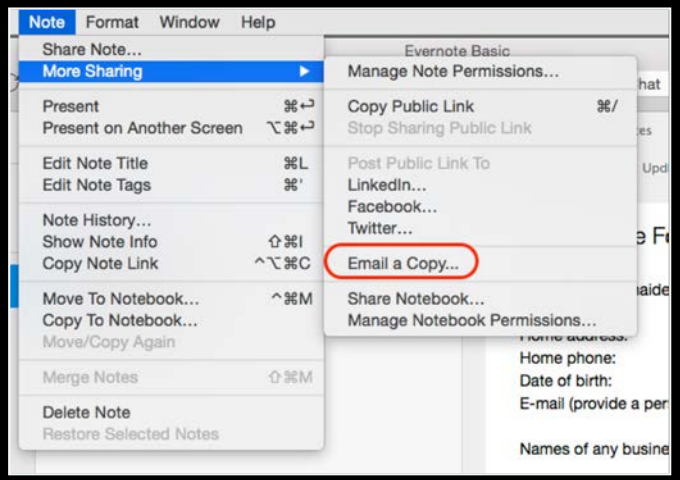
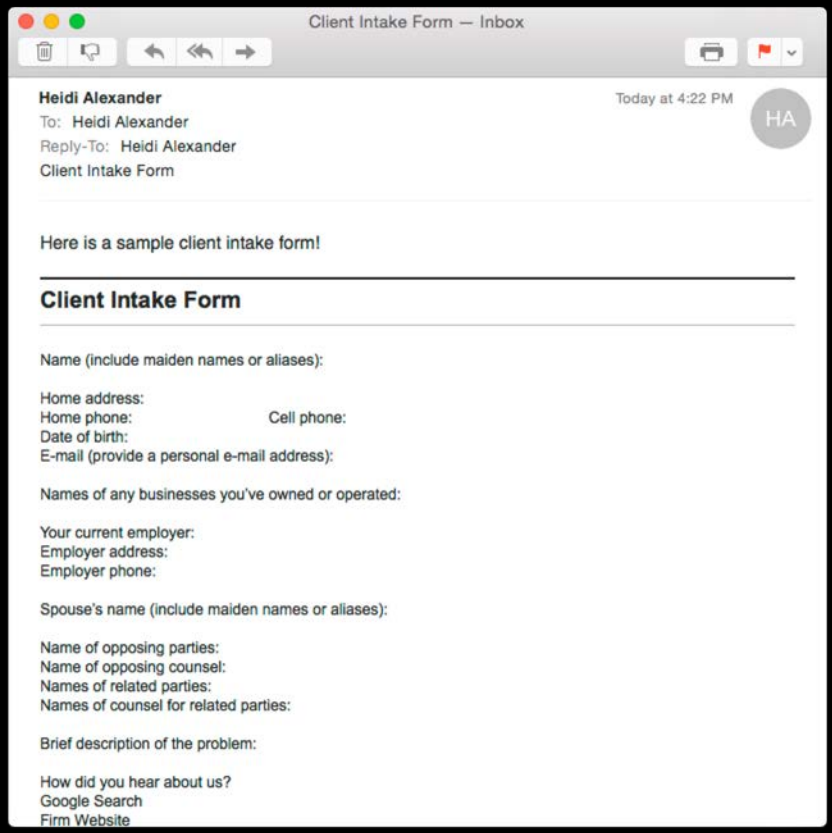
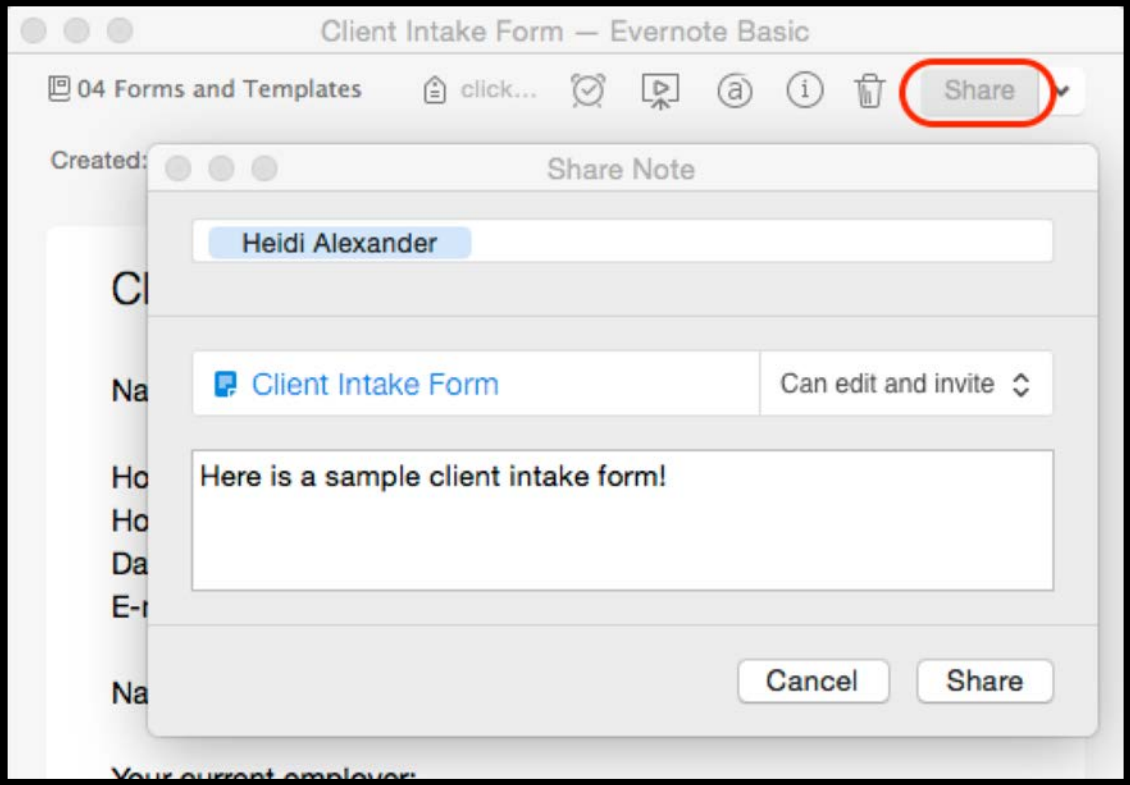


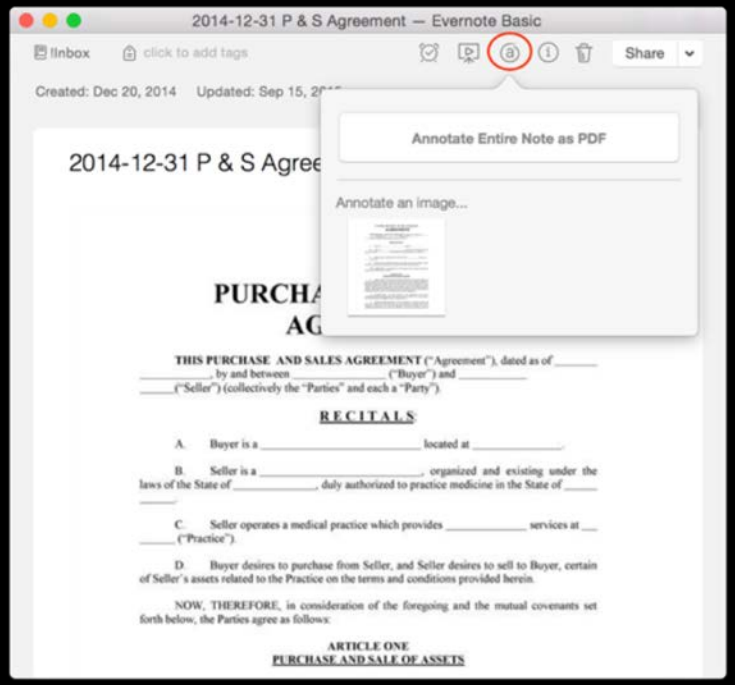


Sharing via Work Chat



Annotate Content

Annotation


2014-12-31 P & S Agreement — Evernote Basic
Inbox
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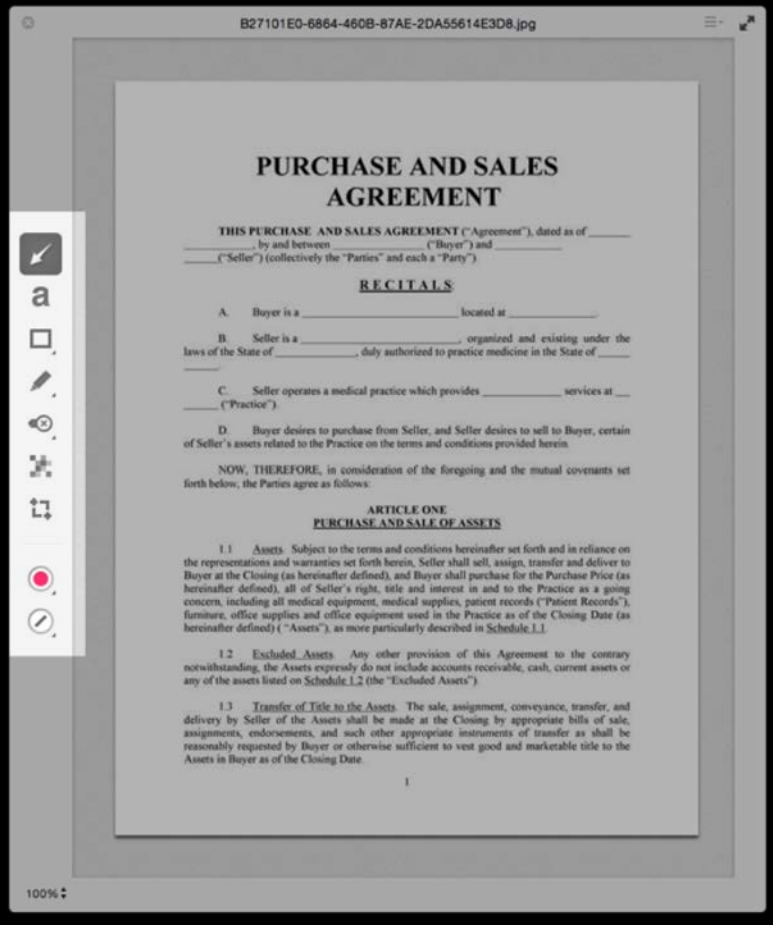
Share
Created: Dec 20, 2014
Annotate Entire Note as PDF
Annotate an image...
2014-12-31 P & S Agree
PURCHA
AG
THIS PURCHASE AND SALES AGREEMENT ("Agreement"), dated as of _____, by and between _____ ("Buyer") and _____ ("Seller") (collectively the "Parties" and each a "Party").
RECITALS
A. Buyer is a _____ located at _____.
B. Seller is a _____, organized and existing under the laws of the State of _____, duly authorized to practice medicine in the State of _____.
C. Seller operates a medical practice which provides _____ services at _____ ("Practice").
D. Buyer desires to purchase from Seller, and Seller desires to sell to Buyer, certain of Seller's assets related to the Practice on the terms and conditions provided herein.
NOW, THEREFORE, in consideration of the foregoing and the mutual covenants set forth below, the Parties agree as follows:
ARTICLE ONE
PURCHASE AND SALE OF ASSETS


B27101E0-6864-460B-87AE-2DA55614E3D8.jpg
PURCHASE AND SALES AGREEMENT
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NOW, THEREFORE, in consideration of the foregoing and the mutual covenants set forth below, the Parties agree as follows:
ARTICLE ONE
PURCHASE AND SALE OF ASSETS
1.1 Assets. Subject to the terms and conditions hereinafter set forth and in reliance on the representations and warranties set forth herein, Seller shall sell, assign, transfer and deliver to Buyer at the Closing (as hereinafter defined), and Buyer shall purchase for the Purchase Price (as hereinafter defined), all of Seller's right, title and interest in and to the Practice as a going concern, including all medical equipment, medical supplies, patient records ("Patient Records"), furniture, office supplies and office equipment used in the Practice as of the Closing Date (as hereinafter defined) ("Assets"), as more particularly described in Schedule 1.1.
1.2 Excluded Assets. Any other provision of this Agreement to the contrary notwithstanding, the Assets expressly do not include accounts receivable, cash, current assets or any of the assets listed on Schedule 1.2 (the "Excluded Assets").
1.3 Transfer of Title to the Assets. The sale, assignment, conveyance, transfer, and delivery by Seller of the Assets shall be made at the Closing by appropriate bills of sale, assignments, endorsements, and such other appropriate instruments of transfer as shall be reasonably requested by Buyer or otherwise sufficient to vest good and marketable title to the Assets in Buyer as of the Closing Date.
1
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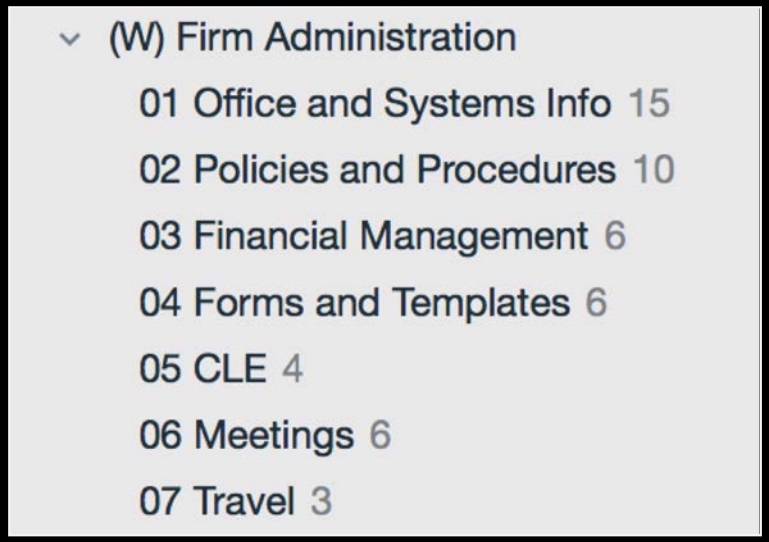
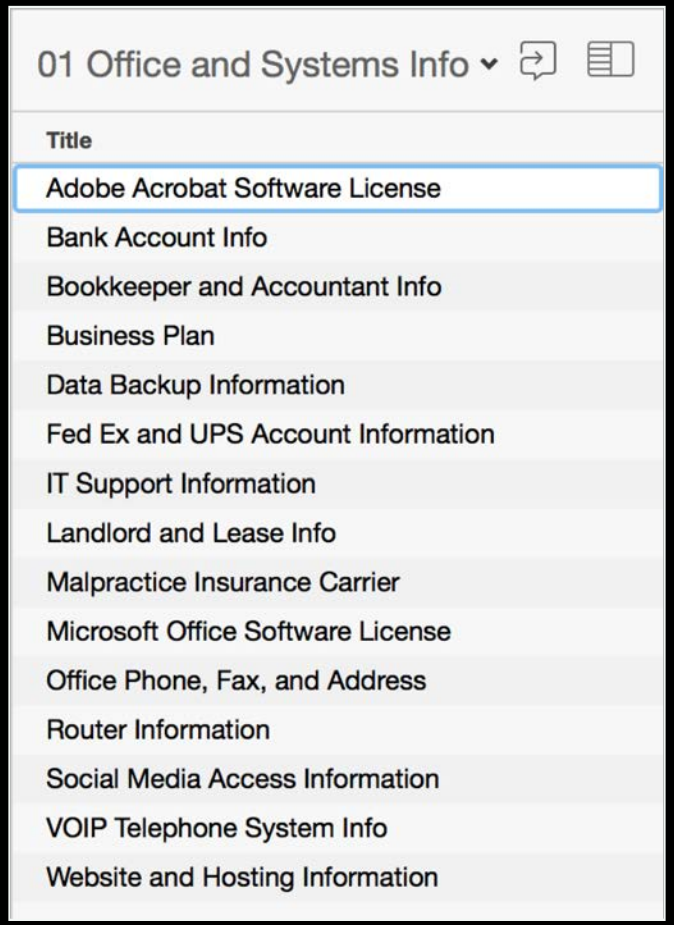
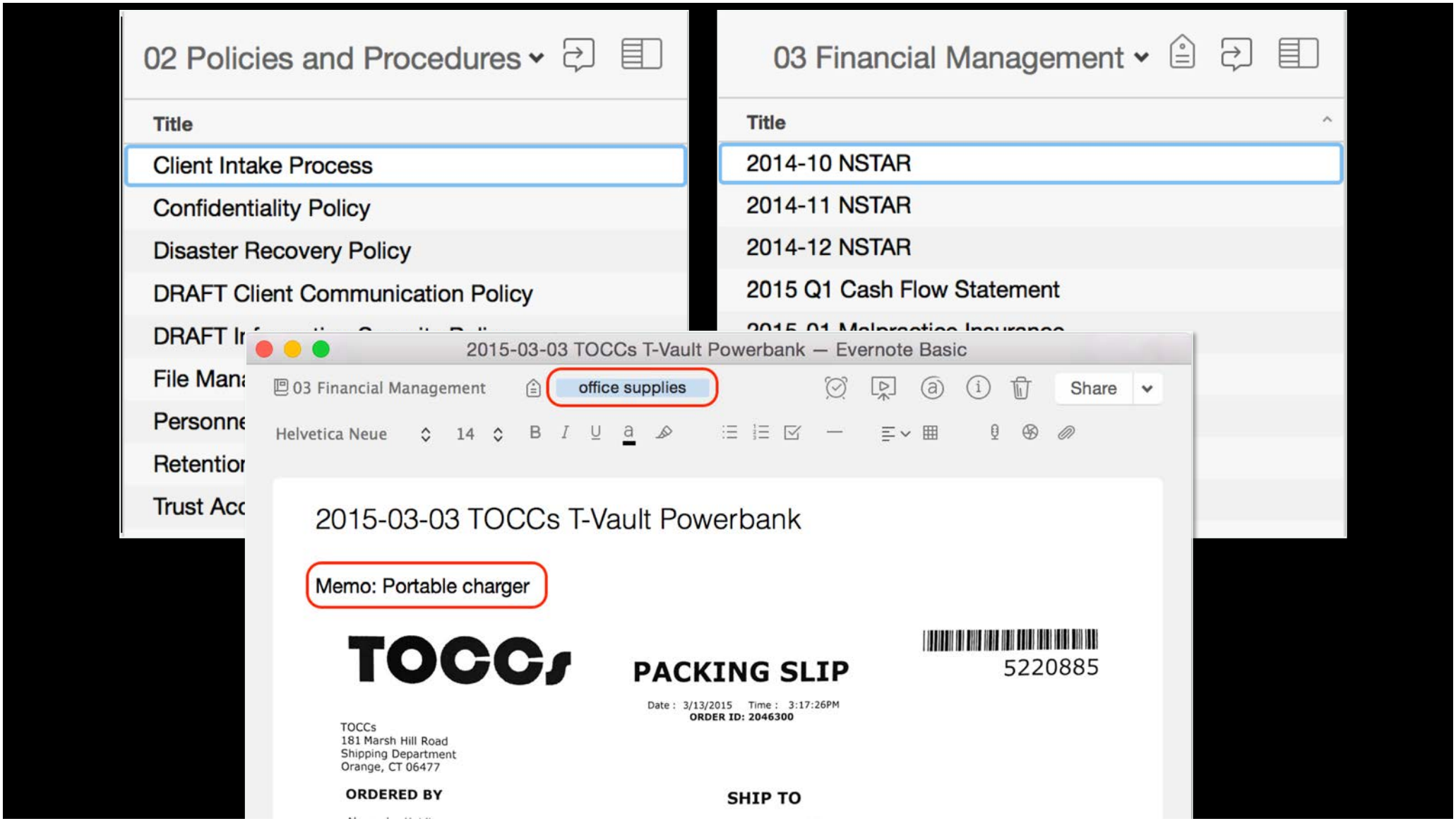
How Can Attorneys Use It?

Firm Administration






02 Policies and Procedures
Title
Client Intake Process
Confidentiality Policy
Disaster Recovery Policy
DRAFT Client Communication Policy
03 Financial Management
Title
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2015 Q1 Cash Flow Statement
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03 Financial Management
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ORDERED BY
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Legal Research

- (W) Legal Research
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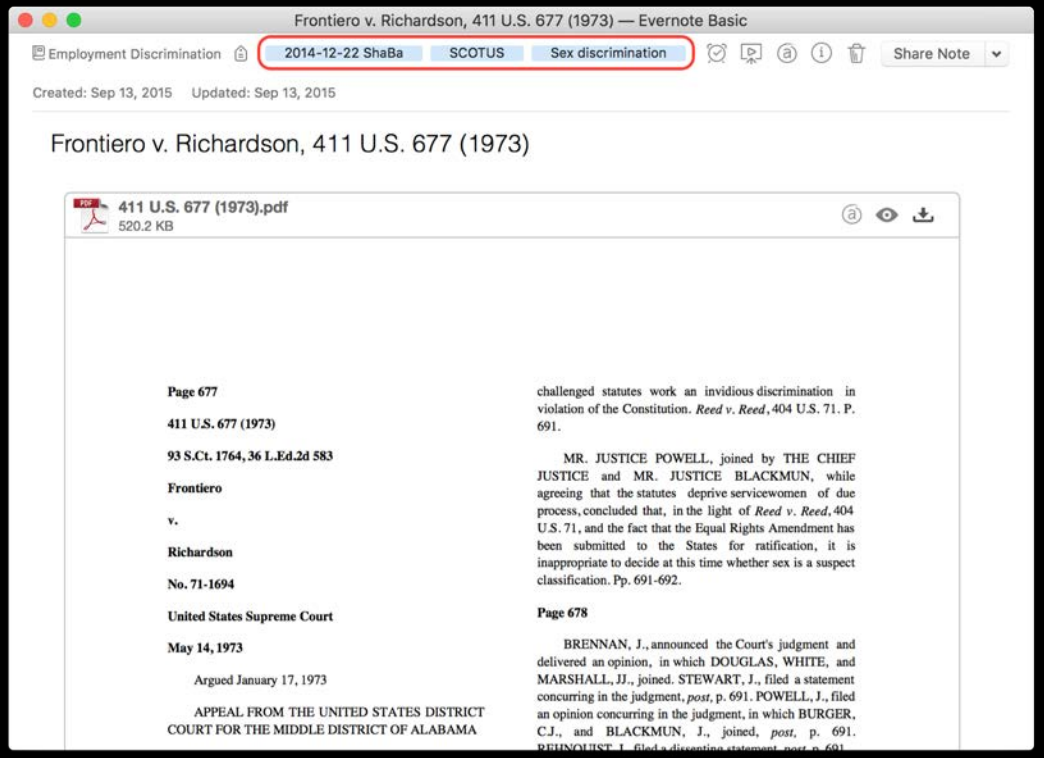
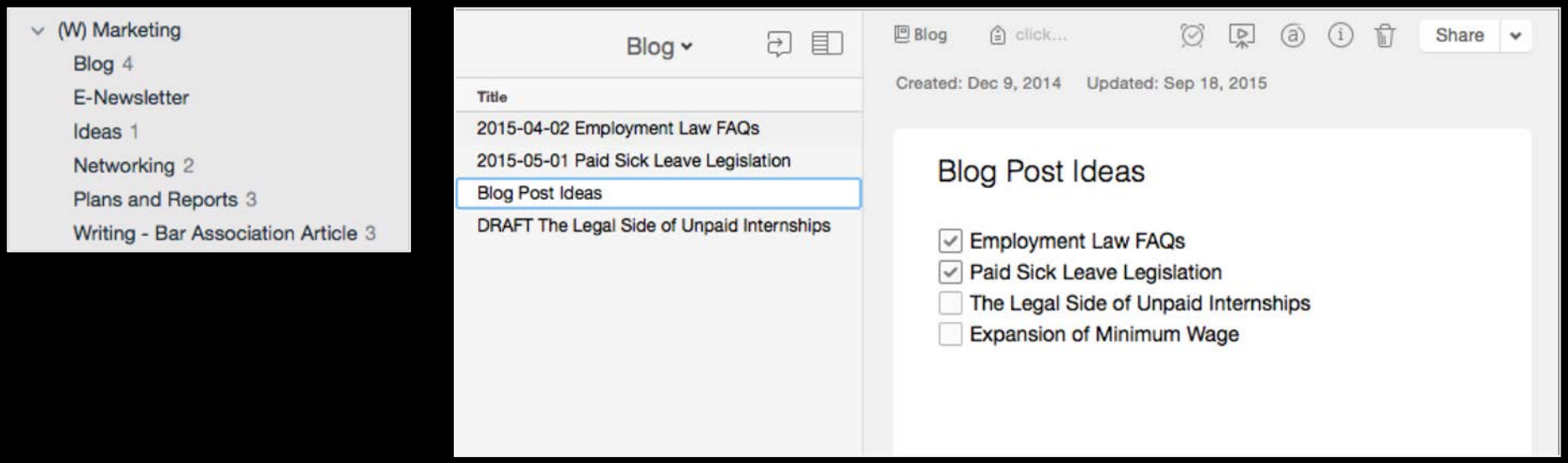
  - Landlord Tenant
  - M.G.L. c. 93A
  - Personal Injury
  - Search and Seizure
  - Special Education
  - Wage and Hour



Marketing


(W) Marketing
Blog 4
E-Newsletter
Ideas 1
Networking 2
Plans and Reports 3
Writing - Bar Association Article 3
Blog
Title
2015-04-02 Employment Law FAQs
2015-05-01 Paid Sick Leave Legislation
Blog Post Ideas
DRAFT The Legal Side of Unpaid Internships
Blog
click...
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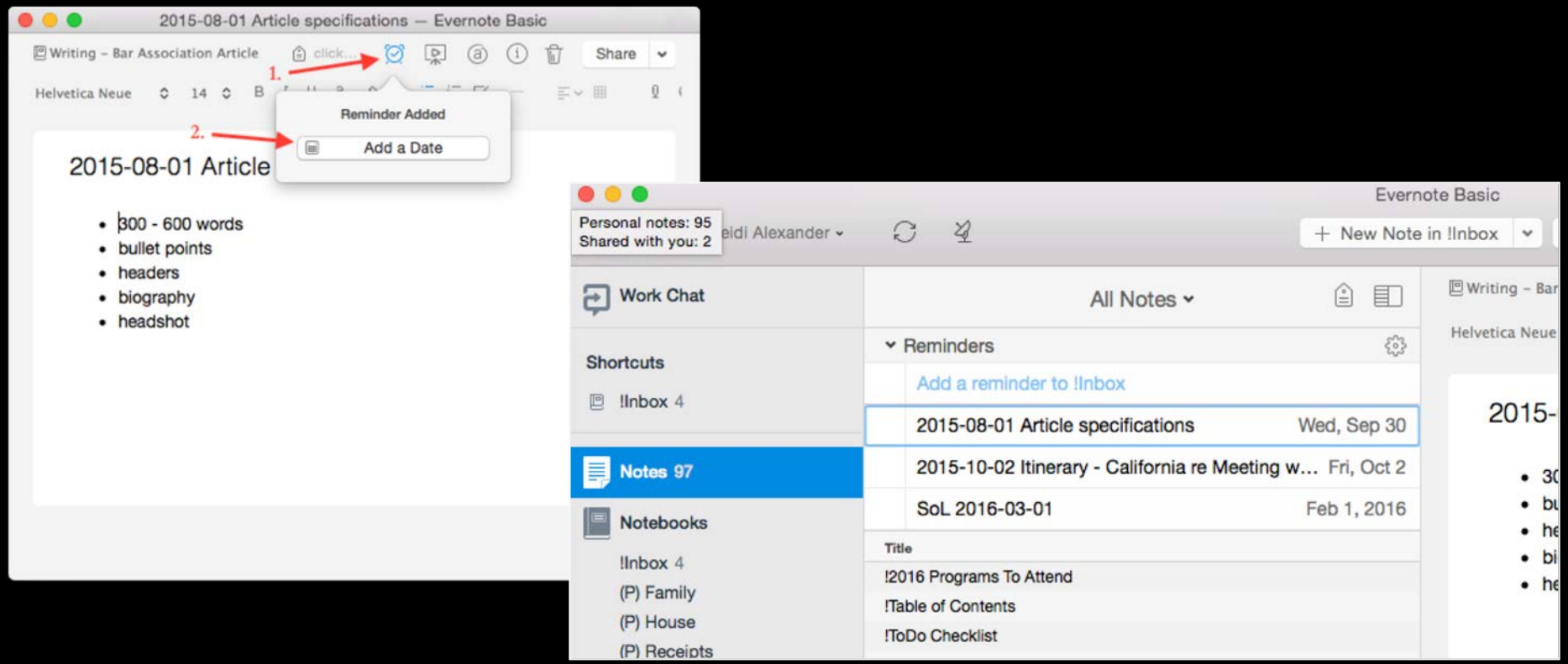
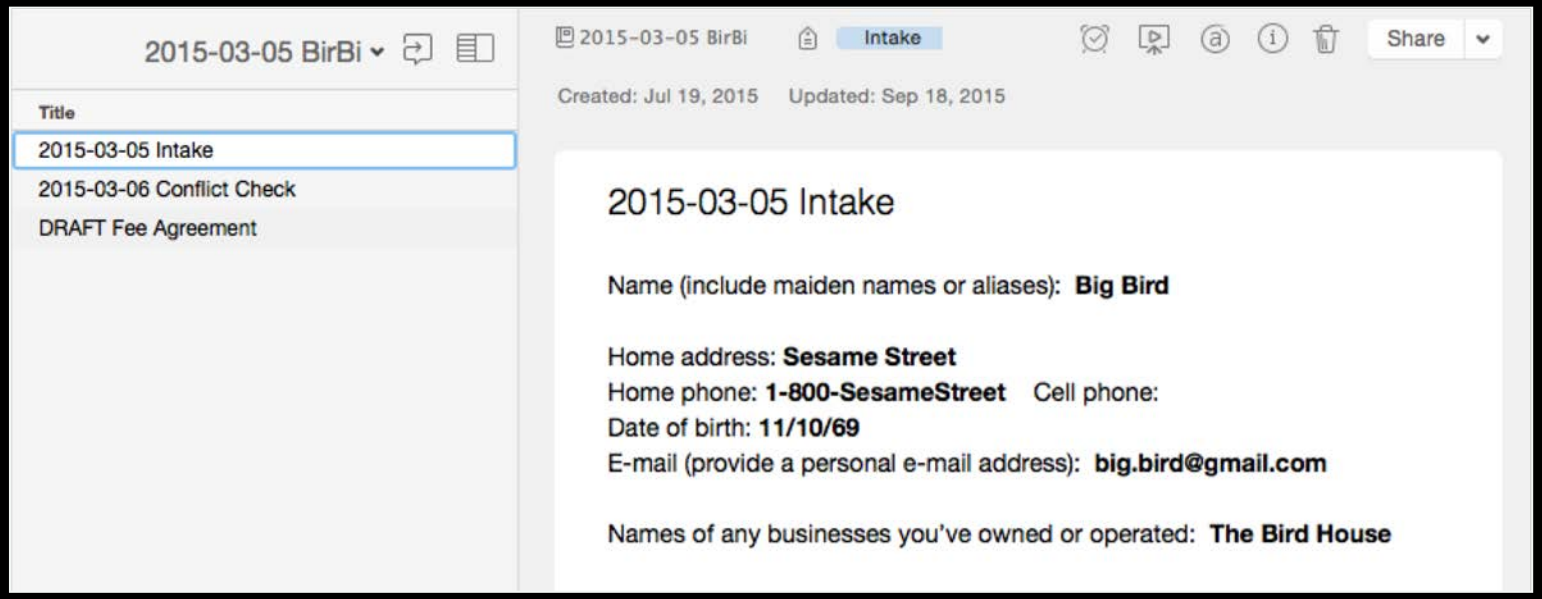
Created: Dec 9, 2014
Updated: Sep 18, 2015
Blog Post Ideas
Employment Law FAQs
Paid Sick Leave Legislation
The Legal Side of Unpaid Internships
Expansion of Minimum Wage

Tip: Set Reminders

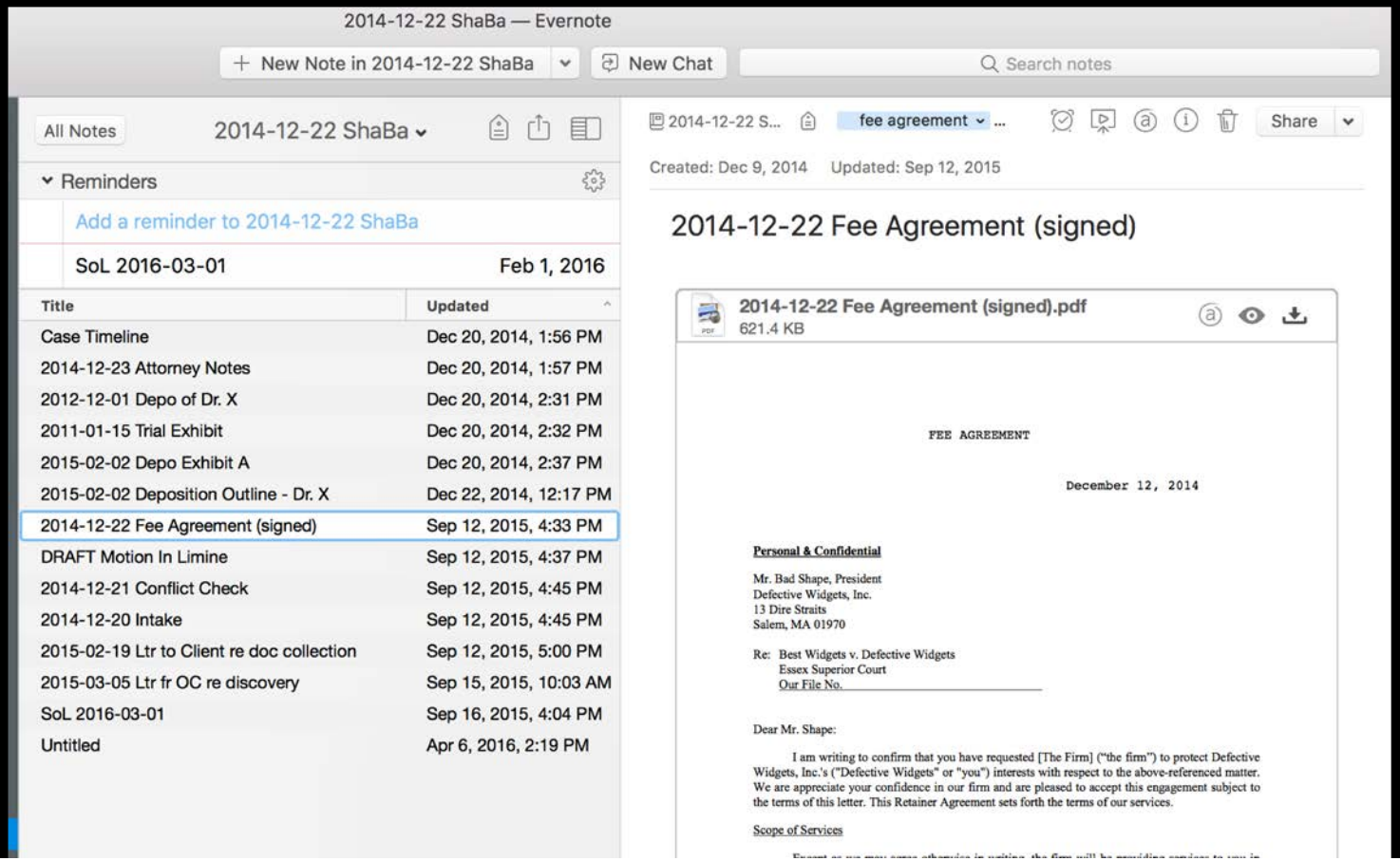


Case Management

Pending Matters



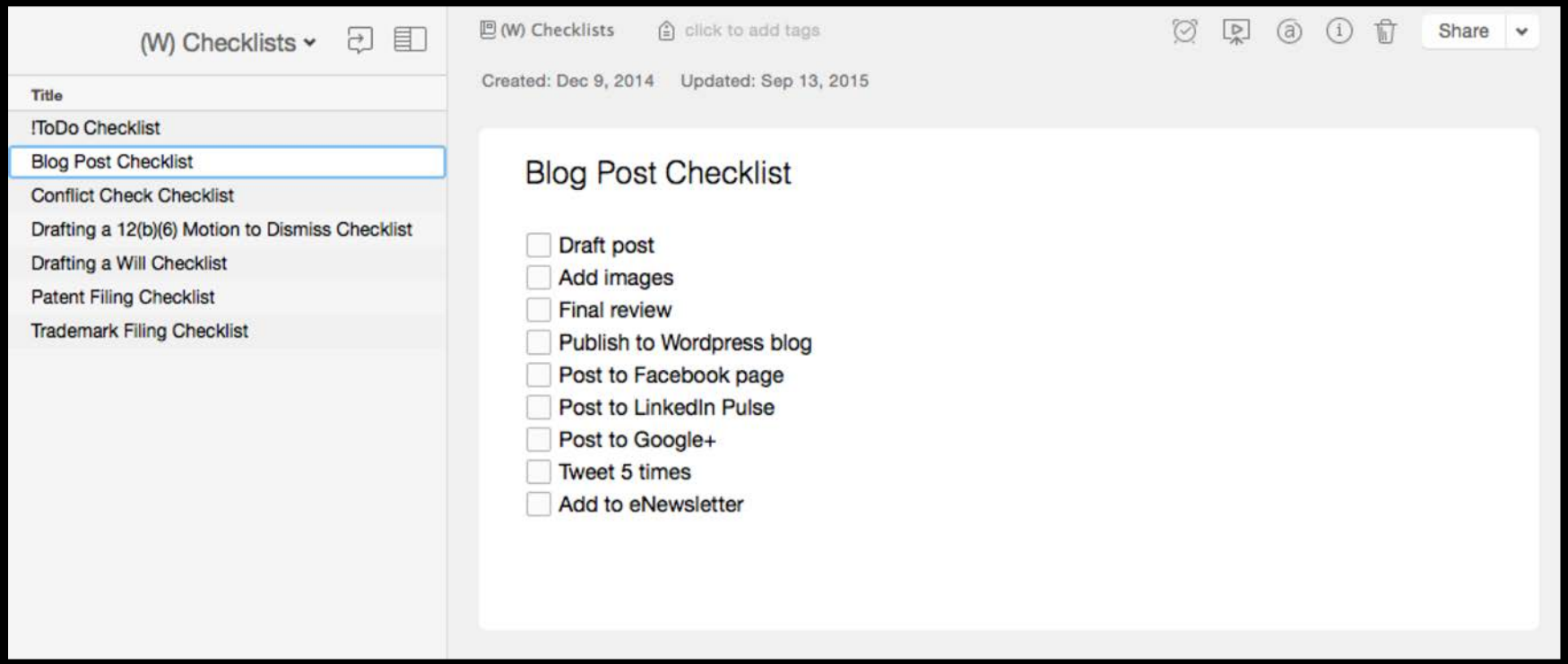
Open Matters



Productivity + Time Management

- Read Later
- Checklists
- Getting Things Done

Checklists


(W) Checklists
Title
!ToDo Checklist
Blog Post Checklist
Conflict Check Checklist
Drafting a 12(b)(6) Motion to Dismiss Checklist
Drafting a Will Checklist
Patent Filing Checklist
Trademark Filing Checklist
(W) Checklists
click to add tags
Share
Created: Dec 9, 2014
Updated: Sep 13, 2015
Blog Post Checklist
Draft post
Add images
Final review
Publish to Wordpress blog
Post to Facebook page
Post to LinkedIn Pulse
Post to Google+
Tweet 5 times
Add to eNewsletter

Is It Secure?

Vetting Evernote

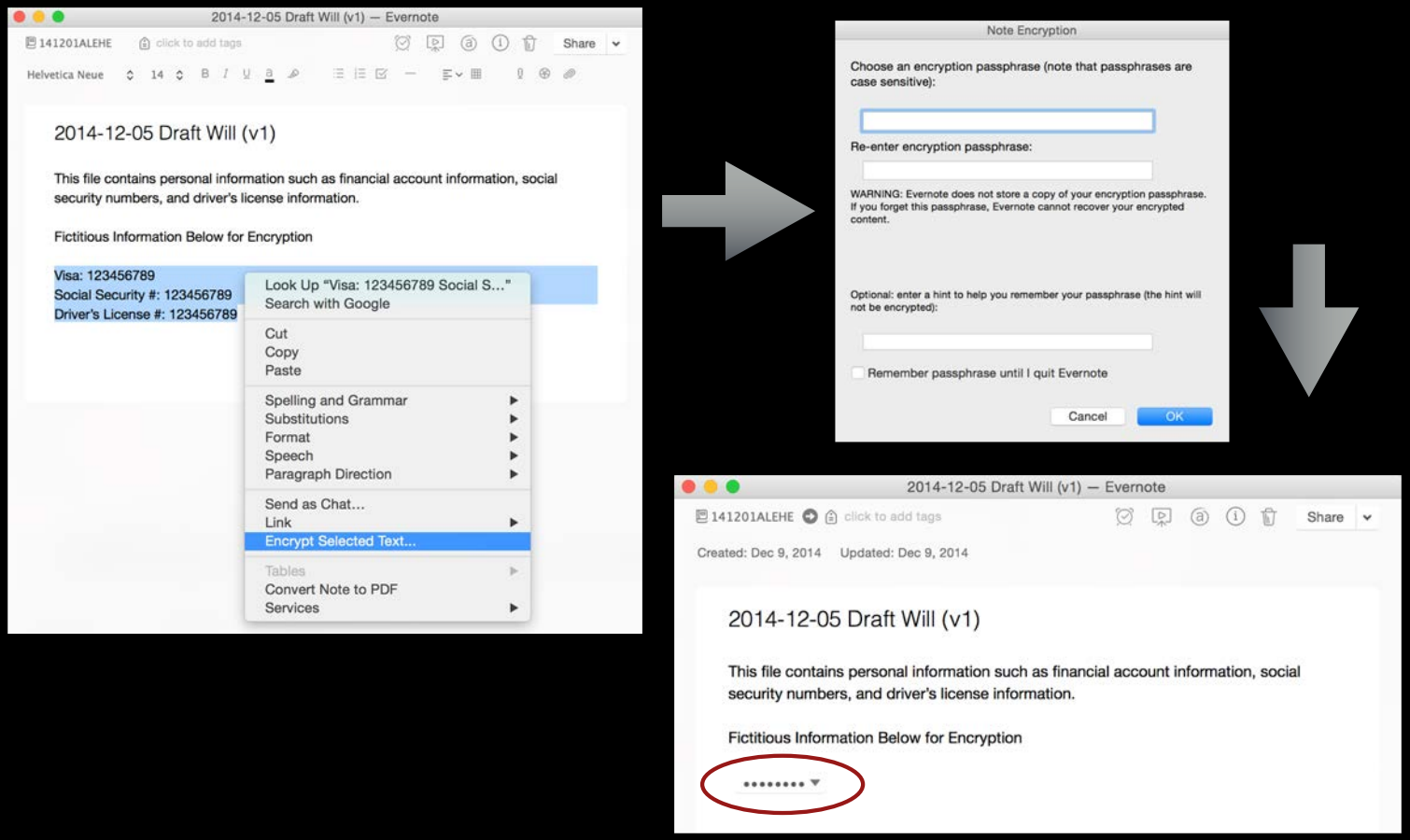
- Evernote does not own your data
- Evernote stores data in “multiple redundant servers, storage devices and off-site backups” in the U.S. monitored 24/7 and accessible only to Evernote employees
- Evernote does not freely share information in response to 3rd party requests (i.e. search warrant required and user notification)
- Data is encrypted in transit and rest

www.evernote.com/security

Securing Evernote

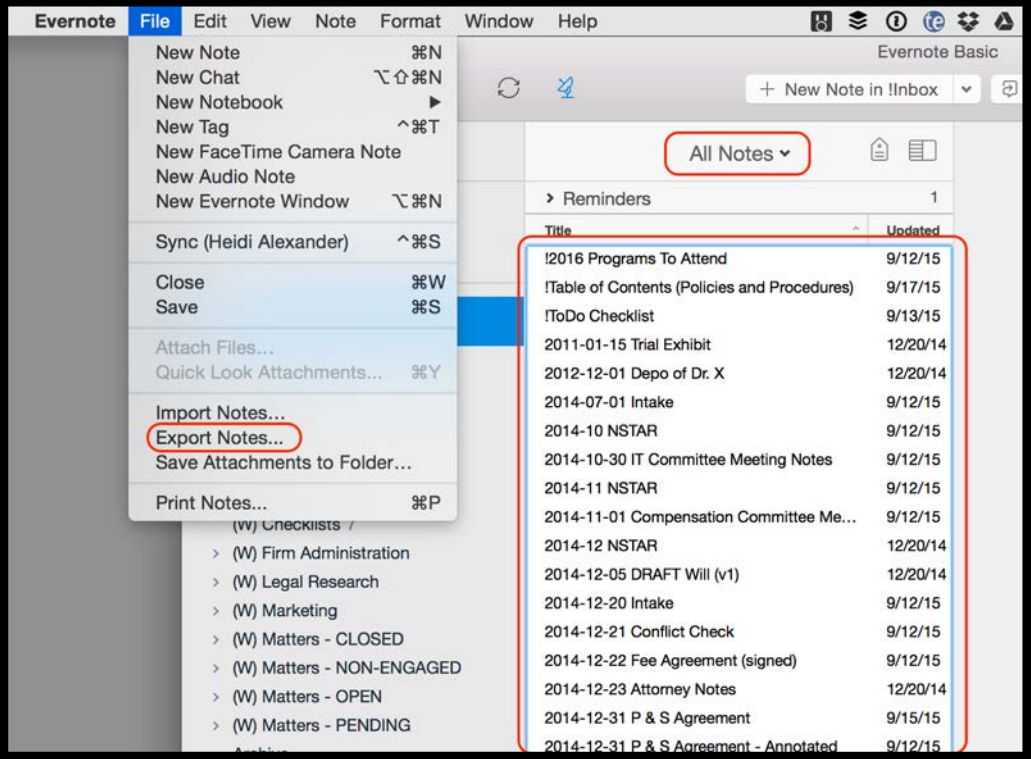
- Strong passwords
- Two-step verification
- Passcode lock
- Local notebooks
- Text encryption

Text Encryption



Backups

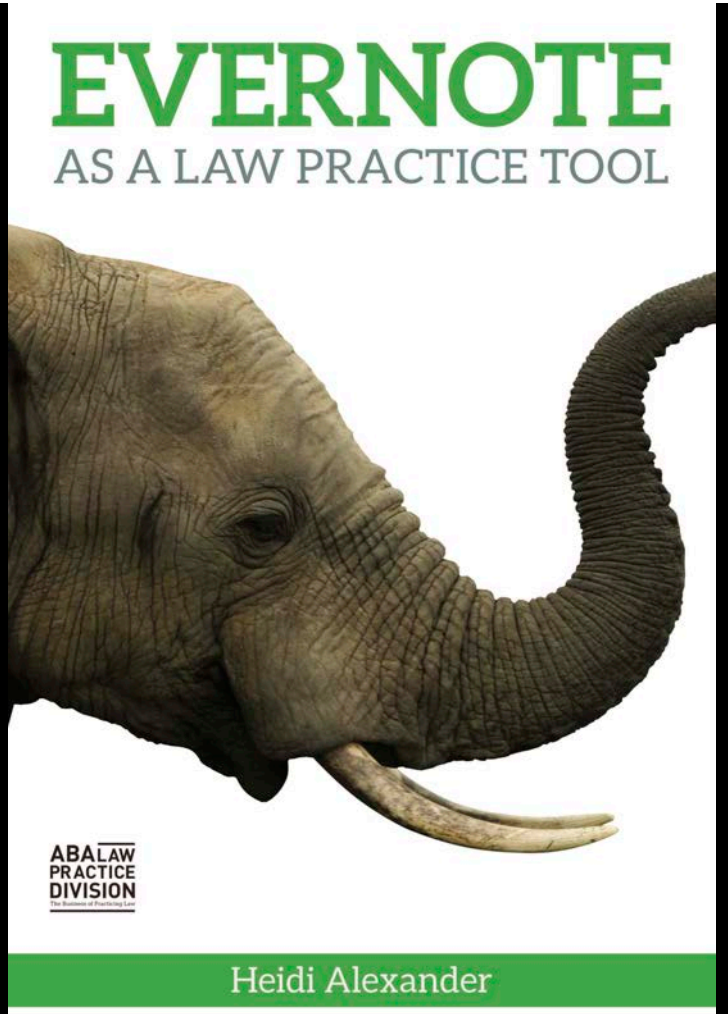
- Evernote data directory
- Export notes



Resources

- Blog:
  - blog.evernote.com
- Help & Learning:
  - https://help.evernote.com/hc/en-us

- ABA Book Store: http://bit.ly/evernotelaw
- Get 15% on all ABA book purchases using code MICHBAR



Questions?

Heidi Alexander
@HeidiAlexander
heidi@masslomap.org