



Law Society
of Ontario

Barreau
de l'Ontario

17th Solo and Small Firm Conference - Secrets for Success

CO-CHAIRS

The Honourable Justice Kathleen Erin Cullin
Superior Court of Justice

Barbara Hicks
Hicks & Hicks Professional Corporation

Jennifer Reynolds
Fresh Legal

June 8, 2023



* C L E 2 3 - 0 0 6 0 2 0 1 - D - W E B *



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Law Society of Ontario

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17th Solo and Small Firm Conference – Secrets for Success

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17th SOLO & SMALL FIRM CONFERENCE



SECRETS FOR SUCCESS

AGENDA



Law Society of Ontario CPD



@LSOCPD #17SoloSmall

AGENDA AT-A-GLANCE

8:00 - 9:00 Breakfast, Exhibitors and The InfoXchange

9:00 - 9:05 Welcome

9:05 - 10:00 Opening Plenary: The Secrets for Success

10:00 - 10:30 Break: Exhibitors and The InfoXchange

CONCURRENT BREAKOUT SEMINARS AND WORKSHOPS

Registrants watch/attend either Seminar A, Seminar B, or a Workshop

	SEMINAR A	SEMINAR B	WORKSHOP
10:30-11:20	Best Practices for Your Team (10 m e)	Integrating Alternative Billing into Your Firm	The Modern Lawyer's Marketing Blueprint
11:20-11:25	Session Change		
11:25-12:15	Successfully Implementing Changes in Your Firm	Pride and Pronouns: Navigating Diversity (50 m e)	Bring Your Own Device - Learn How to Use Microsoft 365 Tools and Outlook to Your Advantage
12:15-1:15	Lunch Exhibitors and The InfoXchange		
1:15-2:05	The Four-Day Work Week	Yes, You Really do Belong - Managing the Imposter Syndrome in Your Life and Practice (30 m e)	Succession Planning for All Stages of Your Career
2:05-2:10	Session Change		
2:10-3:00	The Solo/Small Firm During Challenging Times	Technology Update	Rebooting Your Client Intake Process
3:00-3:30	Break: Exhibitors and The InfoXchange		
3:30-4:30	Closing Plenary: Growth Stories of Successful Law Firms		
4:30-6:00	Reception		

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PLATINUM



GOLD



SILVER



e = Session contains EDI content.

Total CPD = 4 h 30 m Professionalism **p + 1 h 30 m EDI Professionalism **e****

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in Law Society of Ontario CPD
@LSOCPD #17SoloSmall

JUNE 8

9:00 a.m. – 4:30 p.m.

LIVE IN TORONTO, Metro Toronto Convention Centre,
North Building, 255 Front Street West, Toronto
or **LIVE WEBCAST**

CO-CHAIRS



**The Honourable Justice
Kathleen Erin Cullin**
Superior Court of Justice



Barbara Hicks
*Hicks & Hicks
Professional Corporation*



Jennifer Reynolds
Fresh Legal

AGENDA

8:00 a.m. – 9:00 a.m. Breakfast (Room 202), Exhibitors (Room 202) and The InfoXchange (Room 205 A)

9:00 a.m. – 9:05 a.m. **Welcome**

The Honourable Justice Kathleen Erin Cullin, *Superior Court of Justice*

Barbara Hicks, *Hicks & Hicks Professional Corporation*

Jennifer Reynolds, *Fresh Legal*

Do you have questions for the faculty? Speaking times include 10 minutes for Q & A. To submit questions for the faculty, scan the relevant QR code or click on the link below:

Opening/Closing Plenary and Seminar A Questions



<https://bit.ly/3LFcjzM>

Seminar B Questions



<https://bit.ly/3HsYh1U>

Workshop Questions



<https://bit.ly/3NqrdLN>

OPENING PLENARY: Room 206

9:05 a.m. – 10:00 a.m.

The Secrets for Success

What does success look like to you? And what does it look like for your team? And your clients? Our distinguished speaker shares his insights on running the *business* of your law practice successfully so that you can meet your goals. He sets the stage for the conference by offering data-based information to help you make the right decisions for you and your firm. Hear how to design a client-centred law firm, improve your time utilization, create an anti-fragile and more resilient business, increase your competitive edge by using technology, and more.

Jack Newton, CEO & Founder, *Clio*

10:00 a.m. – 10:30 a.m. Break: Exhibitors (Room 202) and The InfoXchange (Room 205 A)

AGENDA

Please note:

- Registrants attend or watch either Seminar A, or Seminar B, or a Workshop.
- Workshop for in-person attendees are a first-come, first served basis. Space is limited.
- **All sessions and all workshops will be available on-demand post-program.**

CONCURRENT BREAKOUT SEMINARS AND WORKSHOPS

BREAKOUT ONE 10:30 a.m. - 11:20 a.m.

SEMINAR A: Room 206

Best Practices for Your Team (10 m e)

If there is one consistent theme from the past three years, it is that the workplace has changed significantly, and perhaps forever. What does that mean for you? More than ever, engaging your staff can reap benefits for you as a business leader, through retention, job satisfaction, and a well-managed professional life. Learn about innovative approaches and new models to create a culture that reflects a firm's vision, as well as meeting employees' needs. Hear why it is essential to have clear employment contracts and solid workplace policies in place, understand how to offer benefits, rewards, and compensation structures that resonate with staff, and where work challenges can give you opportunity for reflection and positive change.

Moderator: **Barbara Hicks**, *Hicks & Hicks Professional Corporation*

Panelists: **James De Melo**, *Construct Legal*
Jonquille Pak, *JPak Employment Lawyers*
Jonathan Richardson, *Richardson Hall LLP*

OR

SEMINAR B: Room 205 B/D

Integrating Alternative Billing into Your Firm

Many of your peers may be shifting away from traditional billing practices – have you thought about it for your firm? Hear how and why you might consider moving from an hourly rate to an alternative billing model. Understand which practice areas alternative billing fits best for, what the process is to implement these systems, how to train and manage your staff, and how to manage your clients and their expectations under these alternative billing arrangements.

Digby Leigh, *Digby Leigh & Co.*
Allison Speigel, *Speigel Nichols Fox LLP*

OR

AGENDA

WORKSHOP: Room 204

The Modern Lawyer's Marketing Blueprint

How do you find your dream clients? Or, perhaps, more importantly, how do they find you? One of the challenges of solo or small firm practice is learning how to create your brand and how to build the relationships that help build your business. Our presenters started their practices from the ground up and share their secrets on how to leverage technology, how to best invest your time (not just your money) in effective marketing techniques and offer solutions so that you can develop a blueprint for your firm's success.

Romesh Hettiarachchi, *Signal Lawyers / Lawtreprenneur*

Andrew Leroy Rudder, *Rudder Law Group*

11:20 a.m. – 11:25 a.m. **Session Change**

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AGENDA

BREAKOUT TWO 11:25 a.m. - 12:15 p.m.

SEMINAR A: Room 206

Successfully Implementing Changes in Your Firm

Change is hard. Navigating change when your staff, clients, and your network of related professionals are involved may be even harder. You need to ensure that the right processes are in place to make these transitions successful. Understand how to implement transformations in varied aspects of your practice, including introducing new technologies, onboarding new staff, reducing or altering your team's responsibilities, and more.

Sukhi Dhillon Alberga, *Bridging Legal Solutions Law Professional Corporation*
Amy Grubb, *Grubb Legal Consulting*

OR

SEMINAR B: Room 205 B/D

Pride and Pronouns: Navigating Diversity (50 m e)

How do you create a more inclusive environment for your clients and in your workplace? Our panel helps you to navigate by giving you a better understanding of concepts relating to the 2SLGBTQ+ community. Learn more about gender identity, what it means today, and become more aware of how to use gender neutral language appropriately.

Renée Fuchs, *Legal Aid Ontario*
Milena Soczka, *Legal Aid Ontario Duty Counsel Office*

OR

WORKSHOP: Room 204

Bring Your Own Device - Learn How to Use Microsoft 365 Tools and Outlook to Your Advantage

You likely already have the tools to make your workflow more efficient, but you might not be using them to their full potential. Bring your own device to this hands-on workshop where you learn how to use Microsoft Office 365, Outlook, and other software more effectively. Discover additional ways to unlock the secrets that will save you (and your team) time and assist you in serving your clients more effectively.

Paul Unger, *Affinity Consulting Group*

12:15 p.m. - 1:15 p.m.

Lunch (Room 202)
Exhibitors (Room 202) and The InfoXchange (Room 205 A)

EXHIBITORS

Everyone could use a helping hand. Stop by our Exhibitors (Room 202) to discover products and services that can take your practice to the next level!



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soluno.legal



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AGENDA

BREAKOUT THREE 1:15 p.m. - 2:05 p.m.

SEMINAR A: Room 206

The Four-Day Work Week

For lawyers, a four-day work week may seem like an unattainable goal. How can you work four days and still be able to service your clients while succeeding financially? Hear how our speakers have taken steps to make this approach work well in their firms. They offer practical tips on the processes you need, the technology they rely on, and the efficiencies they have pursued to make this dream a reality.

Quinn Ross, *The Ross Firm Professional Corporation*
Leena Yousefi, *YLAW*

OR

SEMINAR B: Room 205 B/D

Yes, You Really do Belong – Managing the Imposter Syndrome in Your Life and Practice (30 m e)

Do you ever feel that you are in over your head? Or fear that someone will find out that you are a fraud, and that you have no idea what to do next? In a profession that prizes perfection, competitiveness, and reputation, many lawyers experience feelings of self-doubt throughout their careers, despite their accomplishments. Without the skills to cope, lawyers can experience mental health issues, burnout, or paralyzing anxiety. Our speakers share their personal stories on how to identify “imposter syndrome” and offer strategies to overcome these feelings.

Moderator: **The Honourable Justice Kathleen Erin Cullin**, *Superior Court of Justice*

Panelists: **The Honourable Justice Lucille Shaw**, *Superior Court of Justice*
Neha Chugh, *Chugh Law Professional Corporation*
Doron Gold, *Doron J. Gold, Psychotherapy and Wellness Education*

OR

WORKSHOP: Room 204

Succession Planning for All Stages of Your Career

They say that failing to plan means planning to fail. This holds true for succession planning no matter what stage you are at in your career. If you don't have a proper plan for your practice for unexpected illness, accident, incapacity, or death it can mean negative consequences for your clients, your employees, and even your family. Our panel gives you tips to ensure you are prepared with the steps to take and the documentation you need. They cover how the LSO's Trustee Services get involved when a succession or contingency plan is not in place. Setting up your plan *now* helps safeguard your practice in the future.

Jordan Atin, C.S., TEP, *Atin Professional Corporation*
Kim Mackay, Trustee Services, *Law Society of Ontario*
Colleen Peffers, *PeffersLaw*

AGENDA

2:05 p.m. – 2:10 p.m.

Session Change



COMPLIMENTARY PROFESSIONAL HEADSHOTS

Make sure your first impression is a great one! Visit our on-site photographer to get your professional headshot today.

Registrants will receive an email to book an appointment, on a first come, first served basis. Didn't get an appointment? Visit the photographer's booth on program day for availability.



THE INFOXCHANGE

Have a question in mind? Look to the people at The InfoXchange for the answer! (Room 205 A)



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PRACTICE
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Helpline

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DE LA PRATIQUE

AGENDA

BREAKOUT FOUR 2:10 p.m. – 3:00 p.m.

SEMINAR A: Room 206

The Solo/Small Firm During Challenging Times

Solo and small firms are uniquely positioned to rapidly adapt to the changing landscape because they can quickly pivot when faced with external challenges and are always able to evolve in creative ways. Hear how our panel of speakers handle the stress of change in career path, the economic challenges of the pandemic, mental health obstacles, and the need for resilience to build a strong foundation for their firm.

Katharine Brack, *Osprey Law LLP*

Selwyn Hicks, *Hicks & Hicks Professional Corporation*

Jodie Primeau, *Primeau Law Professional Corporation*

OR

SEMINAR B: Room 205 B/D

Technology Update

The rapid changes in technology are daunting for anyone operating a solo or small firm. Understanding available technology and how – and when – to implement these new tools is critical to your firm to make you competitive. Hear about the risks and opportunities in using AI in your practice, learn about the importance of knowledge management tools, and be aware of the steps you can take to protect from cyber attacks.

Catherine Sanders Reach, Director, Center for Practice Management, *North Carolina Bar Association*

Paul Unger, *Affinity Consulting Group*

OR

WORKSHOP: Room 204

Rebooting Your Client Intake Process

Onboarding new clients is an essential step in your firm's operations. You want to meet your professional obligations and mitigate risk while ensuring you have a process that works for your clients. In this workshop, our speakers provide valuable tips so you can build (or tweak) that process to identify gaps, introduce automation, and create a well-designed intake process that will serve you better.

Lisa Feldstein, *Lisa Feldstein Law Office Professional Corporation*

Jennifer Reynolds, *Fresh Legal*

3:00 p.m. – 3:30 p.m.

Break: Exhibitors (Room 202) and The InfoXchange (Room 205 A)

AGENDA

CLOSING PLENARY: Room 206

3:30 p.m. – 4:30 p.m.

Growth Stories of Successful Law Firms

What does it mean to *grow your firm*? It might be adding staff or perhaps it is increasing the services you provide. Or maybe it's updating processes through tech or expanding the territory you cover. Hear tips and practical insights from speakers who have managed these changes, to see how you can grow your firm in the ways that work for you.

Moderator: **Jennifer Reynolds**, *Fresh Legal*

Panelists: **Jennifer Gold**, *Wood Gold LLP*
Cheryl Siran, *Hook Seller Lundin LLP*
Jacqueline Swaisland, *Landings LLP*
Darlene Tonelli, *Inter Alia Law*

4:30 p.m.

End of Program

4:30 p.m. – 6:00 p.m.

Reception (Room 202)



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e-stateplanner.com



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Law Society of Ontario CPD



This program qualifies for the 2024 LAWPRO Risk Management Credit

What is the LAWPRO Risk Management credit program?

The LAWPRO Risk Management Credit program pays you to participate in certain CPD programs. For every LAWPRO-approved program you take between September 16, 2022 and September 15, 2023, you will be entitled to a \$50 premium reduction on your **2024 insurance premium** (to a maximum of \$100 per lawyer). Completing any Homewood Health Member Assistance Plan e-learning course available at homeweb.ca/map also qualifies you for a \$50 credit.

Why has LAWPRO created the Risk Management Credit?

LAWPRO believes it is critical for lawyers to incorporate risk management strategies into their practices, and that the use of risk management tools and strategies will help reduce claims. Programs that include a risk management component and have been approved by LAWPRO are eligible for the credit.

How do I qualify for the LAWPRO Risk Management Credit?

Attendance at a qualifying CPD program will NOT automatically generate the LAWPRO Risk Management Credit. To receive the credit on your 2024 invoice, you must complete the online Declaration Form.

STEP 1:	STEP 2:
<ul style="list-style-type: none">• Attend an approved program in person or online; and/or• Self-study a past approved program• Completing a Homewood Health e-course*	Complete the online Declaration form at lawpro.ca/RMdec by Sept. 15, 2023. The credit will automatically appear on your 2024 invoice.

You are eligible for the Risk Management Credit if you chair or speak at a qualifying program provided you attend the entire program.

Where can I access a list of qualifying programs?

See a list of current approved programs at lawpro.ca/RMcreditlist. Past approved programs are usually indicated as such in the program materials or download page. Free CPD programs offered by LAWPRO can be found at www.practicepro.ca/cpd

Whom do I contact for more information?

Contact practicePRO by e-mail: practicepro@lawpro.ca or call 416-598-5899 or 1-800-410-1013.

*One Homewood Health e-learning course is eligible for the credit on a yearly basis.

17th Solo and Small Firm Conference: Secrets for Success

June 8, 2023

SKU CLE23-00602

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TAB 1

17th Solo and Small Firm Conference: Secrets for Success

Integrating Alternative Billing into Your Firm Resources

Digby Leigh
Digby Leigh & Co.

Allison Spiegel
Speigel Nichols Fox LLP

June 8, 2023



Integrating Alternative Billing into Your Firm Resources

Digby Leigh, *Digby Leigh & Co.*
Allison Speigel, *Speigel Nichols Fox LLP*

Shutt, Sandra (CANADIAN LAWYER, 2015) The journey from the billable hour to value-based flat fees

<https://www.canadianlawyermag.com/news/general/the-journey-from-the-billable-hour-to-value-based-flat-fees/269807>

Shutt, Sandra (CANADIAN LAWYER, 2016) Case assessments: do them early and often

<https://www.canadianlawyermag.com/news/general/case-assessments-do-them-early-and-often/270063>

Let's Be Frank: Challenging the status quo of pricing legal services
(Monthly LinkedIn Newsletter; 19 editions to date; 1,580 subscribers)

<https://www.linkedin.com/newsletters/6823387679435165696/>

Canadian Bar Talk: Moving Away from Hourly Billing
(Feature Article June 2021)

<https://www.cbabc.org/BarTalk/Articles/2021/June/Features/Moving-Away-from-Hourly-Billing>



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TAB 2

17th Solo and Small Firm Conference: Secrets for Success

The Modern Lawyer's Marketing Blueprint

Andrew Leroy Rudder

Rudder Law Group

Romesh Hettiarachchi

Signal Lawyers / Lawtrepreneur

June 8, 2023

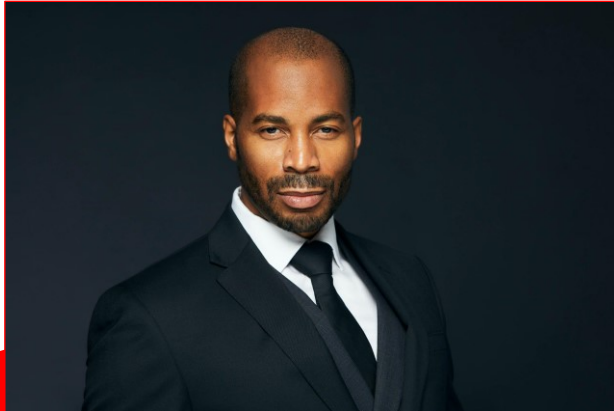


The Modern Lawyer's Marketing Blueprint

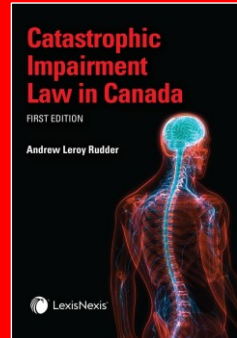
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Andrew Leroy Rudder (he, him)



andrew@rudderlawgroup.ca

1



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Agenda: How & Who, Where and What?

Step Number 1: HOW & WHO?

- **HOW** do you identify **WHO** your target clients are for the purpose of more effective target marketing?

Step Number 2: WHERE?

- **WHERE** are your prospective target clients congregating?
- **WHERE** do your target clients get their information?

Step Number 3: WHAT?

- **WHAT** medium do you use to market your specific legal services to your target clients?

2

Step Number 1: HOW & WHO?

HOW do you identify **WHO** your target clients are for the purpose of more effective target marketing?

- Prior to any marketing campaign, you must first take a deep dive into really knowing your prospective clients, in order to tailor your marketing message directly to them.
- If you want to create marketing campaigns that stand out from your competitors and win over your prospective clients, you need to know them on a deeper level, as opposed to a surface level.
 - You need to know their deepest and most primal desires.
 - You need to know their fears, hopes, wishes, and dreams.
 - You need to know what they're thinking about, but not telling anyone.
 - You need to know how your clients think, feel and act.
- You can learn more about your prospective clients by answering 8 important questions!

3

Question Number 1

Who are your focused set of targeted clients within a niche market?

- As a solo practitioner or small law firm, you have limited resources, so it's difficult to address every legal problem within your area of expertise, without the possibility of spreading yourself too thin.
- If you want to compete with bigger law firms, you have to zero in on a niche market, which is comprised of a focused set of prospective clients who have their own unique needs, preferences and/or identity that's different from other prospective clients in the larger market.
- A niche market is a subset or segment of a larger market on which your specific legal service is focused.
- Focusing on a niche market brings clarity to your marketing message.
- Niche marketing is important because it can:
 - (1) help you corner a part of the market where few other lawyers are present; and
 - (2) it can also help you to position yourself as a specialist/expert and stand-out from other lawyers.

4

Question Number 2

What are your target clients' biggest frustrations and challenges?

- Know your target clients' biggest frustrations and challenges, in order to determine the right emotions to speak to them in your marketing campaigns.
- Know the emotions behind your target clients' challenges and frustrations they are experiencing, which can range from anger, sadness, and fear to remorse, hope and desire for something better.

Impact on Your Marketing Campaigns

- If you're able to speak to exactly what your target clients are feeling, then you'll be able to connect with them emotionally, and not just on a rational level.
- If you're able to communicate to your prospective clients via your marketing campaigns that your legal services are able to solve their biggest frustrations and challenges, then they are more likely to want to retain you as their lawyer.

5

Question Number 3

What are your target clients' hopes, dreams, and desires?

- Know your target clients' hopes, dreams and desires, in order to learn how to paint a vivid picture of what life could be like after they use your legal services.

The Impact on Your Marketing Campaigns

- If you know how your legal services can help your prospective clients attain their hopes, dreams and desires, it becomes much easier to write copy for your law firm's website, landing pages, advertisements, and marketing campaigns that capture the attention of your target audience.

6

Question Number 4

What are your target clients' biggest fears?

- Know the primary things that keep your target clients up at night, tossing and turning, and unable to sleep.
- Know the things that your target clients worry about in their minds, but never tell anyone.

The Impact on Your Marketing Campaigns

- Knowing your target clients' deepest and most primal fears is important because people are motivated more by their pain than they are by pleasure, and are more motivated by the fear of loss than they are by the desire to gain something.
- Therefore, communicating in your marketing campaigns how your legal services can help your target clients address their most primal fears, can get them to act and motivate them to move towards your creative legal solutions, and away from what they fear the most.

7

Question Number 5

What are your target clients' preferred form of communication?

- Know where your target clients want you to communicate with them, which includes, but not limited to:
 - In-person communication;
 - Video conference;
 - Teleconference;
 - Email;
 - WhatsApp; and
 - Messenger.
- Communicate with your target clients where they already are.

The Impact on Your Marketing Campaigns

- Articulating in your marketing campaigns how you'll adapt to accommodate them by communicating with them where they already are, will help to eliminate **friction points** or inconveniences that sometimes stop a prospective client from completing the action of reaching out to you for a free consultation.

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Question Number 6

What phrases, exact language, and vernacular do your target clients use?

“Enter the conversation already taking place in the customer’s mind” – Robert Collier

- Know the language and niche-specific terms being used in your clients’ mind for their hopes, dreams, pain, fears, and desires.
- Listen to the language, phrases, and niche-specific terms they’re already using, and write them down.
- What industry terminology are your target clients using?
- What specific vernacular and niche-specific terms are your target clients using?
- People are more attracted to people and businesses who speak their language, because skepticism is rampant.

The Impact on Your Marketing Campaigns

- If you’re able to create marketing campaigns that’s imbued with the language, phrases and niche-specific terms being used by your target clients’ minds, you’ll resonate with them better.
- Your target clients should be saying to themselves, *“Whoa, it’s like this lawyer is talking directly to me”*.

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Question Number 7

What does a day in your target client’s life look like?

- Know what your target clients’ daily life looks like, in order to add an incredible personal element to your marketing campaigns.

The Impact on Your Marketing Campaigns

- It helps you make more practical decisions and answer useful questions, such as, but not limited to:
 - When is the best time to email your prospective targeted clients?
 - When in the day are they most likely to respond?
 - When are they most attentive to correspondence?
- Your prospective clients are completely different people at 9am on a Monday morning than they are at 7pm. on a Friday evening.
 - You must be aware of all of these subtle differences and use it effectively in your marketing strategy.

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Question Number 8

What makes your target clients
happy?

- Your clients' journey from being retained by your law firm, to when your law firm closes their files, is more than the mere exchange of money for legal services.
- Remember that your clients are emotional human beings, who want to interact with personable people within law firms, and personal brands that make them feel good about themselves.
- Know where the touch points are in your clients' journey
 - Ask yourself: Where can you insert surprises?
 - Be prepared to do the unexpected.
 - Think of how you can bring a smile to your clients' faces.
 - i.e. Updating them at every major milestone, a personalized email sent on their birthday, a handwritten thank-you note after retaining your law firm, a free box full of company swag, etc.
- Happy clients are also more inclined to leave positive reviews (i.e. Google Reviews) and make referrals.

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Step Number 2: WHERE?

WHERE are your prospective target clients
congregating?

WHERE do your target clients get their information?

How are your target clients going to find your law firm?

1. They're going to interact with things that interest them, where you'll interrupt them.
1. They're going to search for you using the most popular search engines, where you'll increase the likelihood that they find you by using popular keyword phrases.

Russell Brunson, co-founder and CEO of ClickFunnels Inc., identified two types of congregations.

1. **Interested-Based Congregations.**
1. **Search-Based Congregations.**

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Interest-Based Congregations

- The first type of congregation is based on interests.

Action Plan

- Start by creating worksheets that list all of the places that your clients congregate.
- Social Network Worksheet: Create a column for each of the main social networks.
 - Write down between 20 to 100 names (pages, groups, influencers, people, et cetera) for each social network.
- Do the same thing for websites, forums and message boards, Facebook groups, podcasts, email newsletters, blogs, vlogs, YouTube channels, and any other important type of congregation.
- These lists are not static, but rather organic in that they'll continue to evolve.
- So, you have re-create the lists periodically throughout the year by pulling off names that aren't bringing in the right clients and adding new names as you find them.

Interest-Based Congregations Continued

- Which websites do your target clients frequently visit?
 - Brainstorm the top websites that come to your mind that they frequently visit and write them down.
- Which forums or message boards do your target clients participate in?
 - Brainstorm and then write down the top forums or message boards they participate in.
- Which Facebook groups do your target clients participate in?
 - Write down the top Facebook groups they participate in and how many members are in each group.
- Which podcasts do your target clients listen to?
 - Brainstorm and then write down the top podcasts they listen to.
- Which email newsletters do your target clients subscribe to?
 - Brainstorm and write down the top email newsletters they subscribe to.
- Which blogs, vlogs and YouTube channels do your target clients read and watch, respectively?
 - Write down the top blogs, vlogs and YouTube channels they read and watch, respectively.

Search-Based Congregations

- The second type of congregation is based on the keyword phrases used on a search platform like Google.
- When someone goes to Google or any other search platform, they type in a keyword phrase looking for something, such as, for example:
 - “Best personal injury lawyers near-me” – transactional keyword phrase; or
 - “What to do after a motor vehicle accident?” – informational keyword phrase.
- As soon as they type a keyword phrase, they enter an existing congregation of people searching for the same thing.

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Search-Based Congregations Continued

3-Types of Keywords

Transactional Keywords

- Keywords searched by people who are ready to make a decision to retain a lawyer.
- Keywords that attract website visitors who will convert at a higher rate than other types of keywords.
 - i.e. “personal injury lawyer near me”

Information Keywords

- Keywords searched by people who have questions around your areas of practice/expertise, but are not necessarily looking for a lawyer/attorney.
 - i.e. “do I need a lawyer for my car accident?” or “what is the statute of limitations for a personal injury?”

Navigational Keywords

- Keywords used by people to navigate to a specific website.
 - i.e. When someone searches for your law firm’s specific name, this is a navigational search.

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Search-Based Congregations Continued: Search Engine Optimization

How do you find Transactional Keywords?

- You can find popular **keyword phrases** that your prospective clients will use in search engines like Google, which will increase the likelihood that they find your law firm, by using free keyword research tools such as [Ubersuggest](#).
- You can also find these keyword phrases by using paid keyword research tools such as [Moz](#) and [Ahrefs](#).

Keyword	Number of Clicks on SEO Results	Search Volume	Cost Per Click	Paid Difficulty	SEO Difficulty	Mobile vs Desktop
Personal Injury Lawyer	27,375	110,000	\$126.00	34	55	M:120,000 D: 56,000

- You want to include the top **transactional and informational keywords** on your website and marketing content.

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Step Number 3: WHAT?

WHAT medium do you use to market your specific legal services to your target clients?

1. Paid-Traffic Marketing

- Invest of your money.

2. Owned-Traffic Marketing

- Invest of your time.

3. Earned-Traffic Marketing

- Invest of your time or your money, or both.

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Paid-Traffic Marketing

- **Paid-traffic marketing** refers to ad spots that you pay for, such as on search engine results pages (SERP) and social network websites, similar to how you would pay to purchase ad space in a print publication.
- Some law firms prefer paid media because it allows them to target the exact type of audience they're looking to engage with. (i.e. Facebook tracks over 50,000 data points on each user as they are using their platform).
- Examples of methods that generate paid traffic include, but are not limited to:
 - Pay Per Click Google Ads;
 - Paid social network ads on sites like LinkedIn, Facebook, Instagram, et cetera;
 - Web banners displayed on affiliate websites;
 - Pay Per Click ads placed on sites your target clients frequent; and
 - Influencer marketing.
- It's important to set a budget for your paid advertising.
- What do you do if you are a solo practitioner or small law firm, and you can't afford paid-traffic marketing?

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Owned-Traffic Marketing

- **Owned-traffic marketing** doesn't require a significant investment of your money, but rather an investment of your time.
- It comes from the creation of your owned assets, such as, but not limited to, the following:
 - Your law firm's **social network websites** (LinkedIn, Facebook, Instagram, TikTok, Pinterest, Twitter, Snapchat, et cetera) that link back to your **law firm's website**;
 - Your law firm's **blog** that's located on your **law firm's website**;
 - Your law firm's **vlog** that's located on your **law firm's website**;
 - Your law firm's **YouTube channel** that links back to your **law firm's website**;
 - Your law firm's **podcast** that links back to your **law firm's website**;
 - Your law firm's **email newsletters** that links back to your **law firm's website**;
 - Your law firm's **webinars** that's either located on, or links back to, your **law firm's website**; and
 - Any other content you created that's housed on your **law firm's website**.

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Owned-Traffic Marketing and Building Your Personal Brand

- You grow your owned-traffic organically through strategic and creative practices, which doesn't require a huge budget, but rather the development of your **personal brand** and the use of effective **storytelling**.
 - A strong **personal brand** helps you and your message cut through the noise online.
- The common trait between successful people on social network websites is their use of the power of building a **personal brand**. Consider the following 3 LinkedIn examples:
 - Gary Vee: 5 million followers (personal brand) vs. Vayner Media: 195,000 followers (corporate brand)
 - Bill Gates: 35 million followers (personal brand) vs. Microsoft: 20 million followers (corporate brand)
- As a solo practitioner or small law firm, one of the advantages you have over larger law firms is your ability to build a strong **personal brand** that effectively tells your unique and authentic **story**, which resonates with people on a deeper, human level.
 - Your prospective clients will connect with your **personal brand** quicker than they will connect with your **corporate brand**.

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Earned-Traffic Marketing

- **Earned-Traffic Marketing** comes from web content produced by third party sources.
- It can be stimulated by your owned media because someone might see your organic content and then share your information about your law firm via **digital word of mouth** to their respective audiences.
- Examples of earned traffic stimulated by your owned media include, but not limited to:
 - Actively doing **speaking engagements** for popular **organizations** with huge followings, that mention your law firm and link back to your **law firm's website**.
 - Writing **books**, **legal journal articles**, **blogs** and **writing** for other **online publications** that include links back to your **law firm's website**.
 - **Interviews** or **mentions** in major **newspapers**, **legal magazines**, **podcasts**, **blogs**, **vlogs**, et cetera that include links to your **law firm's website**.
 - **Press mentions**, like **listicles** or **reviews** written by **legal industry influencers** that rate or suggest your law firm.
 - **Awards** to your law firm for legal excellence in reputable **legal magazines** that link back to your **law firm's website**.

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Earn-Traffic Marketing equals Earned Respect

- **Social Proof**

- When you engage in **earn-traffic marketing** and reputable organizations (i.e. newspapers, magazines, governing bodies/agencies, journals, book publishers, industry influencers, et cetera) are mentioning you, writing about you, interviewing you, reviewing you, recommending you, and linking back to your website, they're not just redirecting traffic to your website, but they are also vouching for you and making it easier for prospective clients to choose you.
- If you tell a client how great you are, it comes off as bragging, but if a respected and trusted third party says you're great, it comes off as authentic validation in the eyes of your prospective clients.

- **Authority**

- When a trustworthy third party publicly states that you're an authority in your area of expertise, it influences the way your prospective clients view you, and ultimately, their decision to retain you as their lawyer.

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Give Value and Know your Law Firm's WHY

Give Value

- The focus of the strategic marketing content that you create for your law firm to attract prospective clients should be on **giving value** to them.
 - Freely give information to your prospective clients that answers their legal questions and educates them, and they will **reciprocate** in some shape or form.
- **The Rule of Reciprocation:** *"The rule requires that one person try to repay, in form, what another person has provided"* – Dr. Robert B. Cialdini, Influence: The Psychology of Persuasion

Know Your Law Firm's WHY

- If you want to engage in effective **storytelling**, then you must know the **WHY** behind your law firm's purpose, not only for your mission statement, but for your entire **law firm's story**.
 - Providing the **WHY** of your **law firm's story** gives your prospective clients a way to connect with you on a personal level and view your law firm as a living, breathing entity.

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*Thank
you*



The Modern Lawyer's Marketing Blueprint

17th Solo and Small Firm Conference: Secrets for Success

Andrew Leroy Rudder

RudderLawGroup.ca

Step Number 1: WHO?

Identifying who your target clients are that want to utilize your legal services.

Who are your target clients that want to utilize your legal services?

Just like how a speaker wants to know who his or her audience is before taking the stage, in order to know how to finetune the delivered message so it resonates with them better, you must also know who your target clients are in order to finetune your marketing campaigns to them better.

Prior to any successful marketing campaign, you must first take a deep dive into really knowing your prospective clients, in order to tailor your marketing message directly to them.

If you want to create marketing campaigns that stand out from your competitors and win over your prospective clients, you can't just know who your target clients are on a surface level, such as, for example, people injured in motor vehicle accidents. You need to know them on a much deeper, substantive level.

You need to know their deepest and most primal desires.

You need to know their fears, hopes, wishes, and dreams.

You need to know what they're thinking about, but not telling anyone.

You need to know how your prospective clients think, feel and act.

Here are eight questions to ask yourself, in order to know your target clients on a much deeper level.

Questions Number 1

Who are your focused set of targeted clients within a niche market?

As a solo practitioner or small law firm, you have limited resources, so it's difficult to address every legal problem within your area of expertise, without the possibility of spreading yourself too thin.

If you want to compete with bigger law firms that have much more resources and a larger marketing budget, then you have to zero in on a niche market, which is comprised of a focused set of prospective clients who have their own unique needs, preferences and/or identity that's different from other prospective clients in the larger market.

A niche market is a subset or segment of a larger market on which your specific legal service is focused.

For example, I'm a solo practitioner and personal injury lawyer, who chose to focus primarily on clients with catastrophic impairments, which is a subset or segment of the larger personal injury market.

I cannot afford to address everyone's personal injury law problem, especially in today's market conditions where the media we use to reach our clients is so highly fragmented. If Rudder Law Group is going to compete with the bigger personal injury law firms, I have to zero in on my niche client, AKA, catastrophically impaired clients. Specificity is key and of the utmost importance.

And while defining my target client might seem, prima facie, like I'm excluding other prospective clients who might retain me as their lawyer, keep in mind that targeting a specific client doesn't mean I have to exclude anyone who doesn't fit the criteria of a catastrophically impaired insured as a result of a motor vehicle accident. However, focusing on a niche market brings clarity to your marketing message.

Niche marketing is important because it can:

1. Help you corner a part of the market where few other lawyers are present; and
2. It can also help you to position yourself as a specialist/expert and stand-out from other lawyers.

Question Number 2

What are your target clients' biggest frustrations and challenges?

Knowing your target clients' biggest frustrations and challenges is important, in order to determine the right emotions to speak to them in your marketing campaigns.

You have to know the emotions behind your target clients' challenges and frustrations they are experiencing, which can range from anger, sadness, and fear to hope, remorse, and a burning desire for something better.

Impact on Your Marketing Campaigns

If you're able to speak to exactly what your target clients are feeling, then you'll be able to connect with them emotionally, and not just on a rational level.

If you're able to communicate to your prospective clients via your marketing campaigns that your legal services are able to solve their biggest frustrations and challenges, then they are more likely to want to retain you as their lawyer.

It will also reflect the types of stories you tell in your marketing campaigns.

Furthermore, when your prospective clients see a testimonial from one of your former clients, whose biggest frustrations and challenges were solved by your legal services, then they will be able to see the positive transformation that took place in someone else in a similar situation, and they'll be more likely to want to retain you as their lawyer.

Question Number 3

What are your target clients' hopes, dreams, and desires?

Knowing your target clients' hopes, dreams and desires is important, in order to learn how to paint a vivid picture of what life could be like after they use your legal services.

The Impact on Your Marketing Campaigns

If you know how your legal services can help your prospective clients attain their hopes, dreams and desires, it becomes much easier to write copy for your law firm's websites, landing pages, advertisements, and marketing campaigns that capture the attention of your target audience.

Question Number 4

What are your target clients' biggest fears?

You have to know the primary things that keep your target clients up at night, and unable to sleep. You have to know the things that your target clients worry about in their minds, but never speak out loud and never tell anyone.

The Impact on Your Marketing Campaigns

Knowing your target clients' deepest and most primal fears is important because people are motivated more by their pain than they are by pleasure, and are more motivated by the fear of loss than they are by the desire to gain something.

Therefore, communicating in your marketing campaigns how your legal services can help your target clients address their most primal fears, can get them to act and motivate them to move towards your creative legal solutions, and away from what they fear the most.

Question Number 5

What are your target clients' preferred form of communication?

You have to know where your target clients want you to communicate with them, which includes, but not limited to, the following:

- In-person communication;
- Video conference;
- Teleconference;
- Email;
- WhatsApp; and
- Messenger.

Learn how to communicate with your target clients where they already are, because if you don't, then they will move on to another law firm that is more convenient for them.

The Impact on Your Marketing Campaigns

Articulating in your marketing campaigns how you'll adapt to accommodate them by communicating with them where they already are, will help to eliminate friction points or inconveniences that sometimes stop a prospective client from completing the action of reaching out to you for a free consultation.

Question Number 6

What phrases, exact language, and vernacular do your target clients use?

"Enter the conversation already taking place in the customer's mind" – Robert Collier

You have to know the language and niche-specific terms being used in your clients' mind for their hopes, dreams, pain, fears, and desires. Learn to listen carefully to the language, phrases, and niche-specific terms that your target clients are already using, and write them down. Don't be afraid to take specific

comments from such places as, but not limited to, Reddit, FaceBook Groups, or YouTube, and document your target clients' word-for-word responses for strategic use in the content of your future marketing campaigns.

Ask yourself these two questions:

- What industry terminology are your target clients using?; and
- What specific vernacular and niche-specific terms are your target clients using?

People are more attracted to people and businesses who speak their language.

The Impact on Your Marketing Campaigns

If you're able to create marketing campaigns that's imbued with the language, phrases and niche-specific terms being used by your target clients' minds, you'll resonate with them better. Your target clients should be saying to themselves, ***"Whoa, it's like this lawyer is talking directly to me"***.

Question Number 7

What does a day in your target client's life look like?

Knowing what your target clients' daily life looks like is important, in order to add an incredible personal element to your marketing campaigns.

The Impact on Your Marketing Campaigns

It helps you make more practical decisions and answer useful questions, such as, but not limited to, the following:

- When is the best time to email your prospective targeted clients?;
- When in the day are they most likely to respond?; and

- When are they most attentive to correspondence?

Remember that your prospective clients are completely different people at 9am on a Monday morning just after the weekend than they are at 7pm. on a Friday evening just before the weekend. You must be aware of all of these subtle differences and use it effectively in your marketing strategy.

Question Number 8

What makes your target clients happy?

Your clients' journey from being retained by your law firm, to when your law firm closes their files, is more than the mere exchange of money for legal services. Remember that your clients are emotional human beings, who want to interact with personable people within law firms, and personal brands that make them feel good about themselves.

You have to know where the touch points are in your clients' journey.

Ask yourself the following: Where can I insert surprises? Be prepared to do the unexpected. Think of how you can bring a smile to your clients' faces, such as, but not limited to, the following:

- Updating them at every major milestone;
- Sending a personalized email to them on their birthdays;
- Sending a handwritten thank-you note to them after they retain your law firm; and/or
- Providing a free box full of company swag.

Happy clients are also more inclined to leave positive reviews (i.e. Google Reviews) and make referrals.

Step Number 2: WHERE?

Ask yourself these two important questions:

- **WHERE** are your prospective target clients congregating?
- **WHERE** do your target clients get their information?

Knowing exactly where your target clients are hanging out influences a lot of things, which range from where you should advertise and what you should advertise, to the specific tone of your copy and the particular vernacular you use in your marketing campaigns.

How are your target clients going to find your law firm?

They're going to either:

1. Interact with things that interest them, where you'll interrupt them; or
2. They're going to search for you using the most popular search engines, such as Google and YouTube, where you'll appear in their searches by using the right keyword phrases.

Russell Brunson, co-founder and CEO of ClickFunnels Inc., identified two types of congregations, as follows:

- **Interested-Based Congregations;** and
- **Search-Based Congregations.**

Interest-Based Congregations

The first type of congregation is based on interests.

Action Plan

Start by creating worksheets that list all of the places that your clients congregate.

Create a social network worksheet, and include a column for each of the main social networks. Write down between 20 to 100 names (pages, groups, influencers, people, et cetera) for each social network.

Do the same thing for websites, forums and message boards, FaceBook groups, podcasts, email newsletters, blogs, vlogs, YouTube channels, and any other important type of congregation. These lists are not static, but rather organic in that they'll continue to evolve. So, you have to re-create the lists two to three times per year by pulling off names that aren't bringing in the right clients and adding new names as you find them.

Which websites do your target clients frequently visit?

- Brainstorm the top websites that come to your mind that they frequently visit and write them down.

Which forums or message boards do your target clients participate in?

- Brainstorm and then write down the top forums or message boards they participate in.

Which FaceBook groups do your target clients participate in?

- Brainstorm and write down the top FaceBook groups they participate in and how many members are in each group.

Which podcasts do your target clients listen to?

- Brainstorm and then write down the top podcasts they listen to.

Which email newsletters do your target clients subscribe to?

- Brainstorm and write down the top email newsletters they subscribe to.

Which blogs, vlogs and YouTube channels do your target clients read and watch, respectively?

- Write down the top blogs, vlogs and YouTube channels they read and watch, respectively.

Search-Based Congregations

The second type of congregation is based on the keyword phrases used on a search platform like Google.

When someone goes to Google or any other search platform, they type in a keyword phrase looking for something, such as, but not limited to, the following:

- *“Best personal injury lawyers near-me”* – transactional keyword phrase; or
- *“What to do after a motor vehicle accident?”* – informational keyword phrase.

As soon as they type a keyword phrase, they enter an existing congregation of people searching for the same thing.

These searches can occur on (1) Google, Yahoo, and YouTube.com, where people search for videos, (2) Pinterest, where people search for images, (3) Quora.com, where people can ask questions on any topic, or (4) any other search platform.

Three Types of Keywords

Transactional Keywords

These are keywords searched by people who are ready to decide to retain a lawyer. They attract website visitors who will convert at a higher rate than other types of keywords. An example of a transactional keyword phrase is: *“personal injury lawyer near me”*.

Information Keywords

These are keywords searched by people who have questions around your areas of practice and/or expertise, but are not necessarily looking for a lawyer. Examples of information keywords are: *“do I need a lawyer for my car accident?”* or *“what is the statute of limitations for a personal injury?”*

Navigational Keywords

These are keywords used by people to navigate to a specific website. An example of a navigational keyword is when someone searches for your law firm’s specific name.

How do you find the most popular transactional keyword phrases?

You can find popular keyword phrases that your prospective clients will use in search engines like Google, which will increase the likelihood that they find your law firm, by using free keyword research tools such as Ubersuggest. You can also find these keyword phrases by using paid research tools such as Moz and Ahrefs.

When you use the aforementioned keyword research tools, you’ll obtain a wide range of data from search volume, cost per click and SEO difficulty, to paid difficulty, number of clicks on SEO results, and a breakdown of the searches from both mobile and desktop devices.

Here is an example of data I organized using Ubersuggest to search for personal injury related keyword phrases:

Keyword Research — Organizing the Data						
Subject	Keyword	Search Volume	Cost Per Click	SEO Difficulty	Paid Difficulty	Number of Clicks on SEO Results
Car Accident	Car Accident Lawyer	110,000	\$127.33	46	27	34,492
Catastrophic Impairment Accident	Catastrophic Injury Lawyer	1,600	\$0.00	31	2	
Wrongful Death Accident	Wrongful Death Lawyer	14,800	\$95.07	49	5	7,400
Slip and Fall Accident	Slip and Fall Lawyer	18,100	\$99.94	18	26	
Pedestrian Accident	Pedestrian Accident Lawyer	6,600	\$2.60	15	1	
Cyclist Accident	Cyclist Accident Lawyer	390	\$0.00	19	18	
Assault	Assault Lawyer	1,600	\$68.75	42	38	
Personal Injury Law	Personal Injury Lawyer	110,000	\$126.00	55	34	27,375
Car Accident	Car Accident Lawyer near me	18,900	\$123.53	51	58	2,413
Catastrophic Impairment Accident	Catastrophic Impairment Settlement Ontario	50	\$10.75	41	1	
Wrongful Death Accident	Wrongful Death Lawyer near me	720	\$76.33	52	53	
Slip and Fall Accident	Slip and Fall Accident Lawyer	4,400	\$193.84	9	8	
Pedestrian Accident	Pedestrian Accident	201	\$4.97	43	10	

	Lawyer near me					
Cyclist Accident	Bicycle Accident Lawyer	5,400	\$8.14	15	1	
Assault	Assault Lawyer near me	590	\$58.56	52	73	
Personal Injury Law	Personal Injury Lawyer near me	22,000	\$68.66	53	64	325
Truck Accident	Truck Accident Lawyer	33,100	\$203.79	24	4	
Car Accident	Vehicle Accident Lawyer	720	\$400.00	57	56	
Car Accident	Motor Vehicle Accident Lawyer	880	\$68.63	49	25	
Personal Injury Law	Personal Injury Attorney	74,000	\$66.68	68	24	11,684
Personal Injury Law	Car Accident Attorney	60,500	\$114.25	49	33	15,921
Wrongful Death Accident	Wrongful Death Attorney	8,100	\$119.71	45	35	2,700
Slip and Fall Accident	Slip and Fall Attorney	9,900	\$146.39	15	24	4,950
Pedestrian Accident	Pedestrian Accident Attorney	6,660	\$101.96	16	3	

Step Number 3: WHAT?

WHAT medium do you use to market your specific legal services to your target clients?

1. Paid-Traffic Marketing;
2. Own-Traffic Marketing; and
3. Earned-Traffic Marketing.

Paid-Traffic Marketing

Paid-traffic marketing refers to ad spots that you pay for, such as on search engine results pages (SERP) and social network websites, similar to how you would pay to purchase ad space in a print publication.

Some law firms prefer paid media because it allows them to target the exact type of audience they're looking to engage with.

- For example, FaceBook automatically tracks over 50,000 data points on each user as they are using their platform, which enables you to target very specific demographics with your marketing campaigns.

Examples of methods that generate paid traffic include, but are not limited to, the following:

- Pay Per Click Google Ads;
- Paid social network ads on sites like LinkedIn, FaceBook, Instagram, et cetera;
- Web banners displayed on affiliate websites;
- Pay Per Click ads placed on sites your target clients frequent; and
- Influencer marketing.

It's important to set a budget for your paid advertising.

What do you do if you are a solo practitioner or small law firm, and you can't afford paid-traffic marketing?

ANSWER: Owned-Traffic Marketing and Earned-Traffic Marketing

Owned-Traffic Marketing

Owned-traffic marketing doesn't require an investment of your money, but rather an investment of your time.

It comes from the creation of your owned assets, such as, but not limited to, the following:

- Your law firm's social network websites (LinkedIn, FaceBook, Instagram, TikTok, Pinterest, Twitter, Snapchat, et cetera) that link back to your law firm's website;
- Your law firm's blog that's located on your law firm's website;
- Your law firm's vlog that's located on your law firm's website;
- Your law firm's YouTube channel that links back to your law firm's website;
- Your law firm's podcast that links back to your law firm's website;
- Your law firm's email newsletters that links back to your law firm's website;
- Your law firm's webinars that's either located on, or links back to, your law firm's website; and
- Any other content you created that's housed on your law firm's website.

Owned-Traffic Marketing and Building Your Personal Brand

You grow your owned-traffic organically through strategic and creative practices, which doesn't require a budget, but rather the development of your personal brand and the use of effective storytelling. It helps you and your message cut through the noise online.

The common trait between successful people on social network websites is their use of the power of building a personal brand. Here are examples of the power of personal branding over corporate branding:

- Gary Vaynerchuk: 5 million LinkedIn followers (personal brand) **versus** Vayner Media: 195,000 LinkedIn followers (corporate brand); and
- Bill Gates: 35 million LinkedIn followers (personal brand) **versus** Microsoft: 20 million LinkedIn followers (corporate brand).

As a solo practitioner or small law firm, one of the advantages you have over larger law firms is your ability to build a strong personal brand that effectively tells your unique and authentic story, which resonates with people on a deeper, human level. Your prospective clients will connect with your personal brand quicker than they will connect with your corporate brand.

Earned-Traffic Marketing

Earned-traffic marketing comes from web content produced by third party sources. It can be stimulated by your owned media because someone might see your organic content and then share your information about your law firm via digital word of mouth to their respective audiences.

Examples of earned traffic stimulated by your owned media include, but not limited to, the following:

- Actively doing speaking engagements for popular organizations with huge followings, that mention your law firm and link back to your law firm's website;
- Writing books, legal journal articles, blogs and writing for other online publications that include links back to your law firm's website;
- Interviews or mentions in major newspapers, legal magazines, podcasts, blogs, vlogs, et cetera that include links to your law firm's website;
- Press mentions, like listicles or reviews written by legal industry influencers that rate or suggest your law firm; and

- Awards to your law firm for legal excellence in reputable legal magazines that link back to your law firm's website.

Earned-Traffic Marketing equals Earned Respect

Social Proof

When you engage in earn-traffic marketing and reputable organizations (i.e. newspapers, magazines, governing bodies/agencies, journals, book publishers, industry influencers, et cetera) are mentioning you, writing about you, interviewing you, reviewing you, recommending you, and linking back to your website, they're not just redirecting traffic to your website, but they are also vouching for you and making it easier for prospective clients to choose you.

If you tell a client how great you are, it comes off as bragging, but if a respected and trusted third party says you're great, it comes off as authentic validation in the eyes of your prospective clients.

Authority

When a trustworthy third party publicly states that you're an authority in your area of expertise, it influences the way your prospective clients view you, and ultimately, their decision to retain you as their lawyer.

Give Value and Know your Law Firm's WHY

Give Value

The focus of the content that you create for your law firm to attract prospective clients should be on giving value to them.

Freely give information to your prospective clients that answers their legal questions and educates them, and they will reciprocate in some shape or form.

The Rule of Reciprocation: *"The rule requires that one person try to repay, in form, what another person has provided"* – Dr. Robert B. Cialdini, *Influence: The Psychology of Persuasion*

You also elevate your status as an authority figure when you educate people, because you are placed in the role of the teacher and your audience is placed in the role of students.

Know Your Law Firm's WHY

If you want to engage in effective storytelling, then you must know the WHY behind your law firm's purpose, not only for your mission statement, but for your entire law firm's story.

Here are some questions that you can answer to help you discover your law firm's WHY:

- What inspired your idea to start your law firm?;
- What is unique and intriguing about your law firm?;
- What is interesting and intriguing about the founding story of your law firm?;
- What unique legal problems is your law firm trying to creatively solve?;
- What is the purpose of your law firm?;
- How has your law firm evolved from its humble beginnings to the present day?; and
- Is there a specific social justice issue or noble cause that your law firm fights for and supports?

Providing the WHY of your law firm's story gives your prospective clients a way to connect with you on a personal level and view your law firm as a living, breathing entity.

Contact Me for Further Information

I hope you found this information and gained some value from it.

If you want to learn more, or if you have any further questions, then please don't hesitate to contact me at andrew@rudderlawgroup.ca, or visit my website at www.RudderLawGroup.ca to book a free consultation.

Thank you!



The Modern Lawyer's Marketing Blueprint

Discover New Ways To Build A Strong Foundation For The Success Of Your Legal Practice.



1

INTRODUCTION

About Romesh

Sole Practitioner

- Signal Lawyers
- Business Owners
- Solve Problems In and Out of Court

Virtual Coach and Mentor

- Lawtreprenuer
- Helps Solo Lawyers
- Modernize Legal Practices

Mission

- Help 1,000 Lawyers Manage Legal Practice From Phone



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2

2

INTRODUCTION

About The Marketing Blueprint

Lawtrepreneur provides solo and small firm lawyers the learning experiences and support they need to design processes and integrate technology into their business.

As a result, our members are better able to deliver more value to clients, be more productive and live more balanced lives.

Foundation For Marketing Initiatives

- Value Propositions
- Client Journeys
- Key Advisors To Inform Decisions

Key Learning Outcomes

- Create A Value Proposition For Your Practice
- Design a Customer Journey
- Identify Your Supports

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3

3

An Introduction To Value Propositions

LAW
TRE
PRE
NEU
R

4

Understanding Value Propositions

Value Propositions are the reasons why customers choose to support your practice over others.

Essential for effective marketing & sales strategies.

- The benefits of your service.
- The solutions you offer.
- What makes you different from competitors.

Key Elements

- Clear, concise, and compelling
- Audience Centric
- Addresses A Problem
- Focuses on Outcome
- Credible

Key Elements Of Your Value Propositions

When answering these questions, consider who your ideal clients are and what solutions those clients are looking for.

What **problems** are you solving?

- Client centric
- Emotional
- Financial
- Intangible

Who are you **solving** those problems for?

- Gender
- Demographics
- Money
- Geography

What **solution** are you offering?

- Standalone
- Retainer
- Fixed Fee
- Practice Area

Why should a customer **choose** you over others?

- Cost
- Quality
- Security
- Feelings

Value Proposition Template

[Law Firm Name] helps **[Audience]** deal with **[Problem]** by providing **[Solution]**. Our clients trust us because **[Differentiator]**.

This is just one of many templates for a value proposition statement.

Feel free to experiment with placeholders to create a statement that feels authentic to you.

Lawtrepreneur helps **[solo and small firm lawyers]** **[deliver more value to clients, practice more efficiently and live more balanced lives.]**

We do so by **[providing the virtual learning experiences and support our clients need to design processes and integrate technology into their business.]**

Defining Your Client Journey Experience

LAW
TRE
PRE
NEU
R

2

The Importance Of Client Journeys

Your client journey is the sum of the various interactions and experiences between you and your client.

Helps you:

- Anticipate the needs and expectations of your clients.
- Identifies specific touchpoints where clients need extra attention.

Benefits

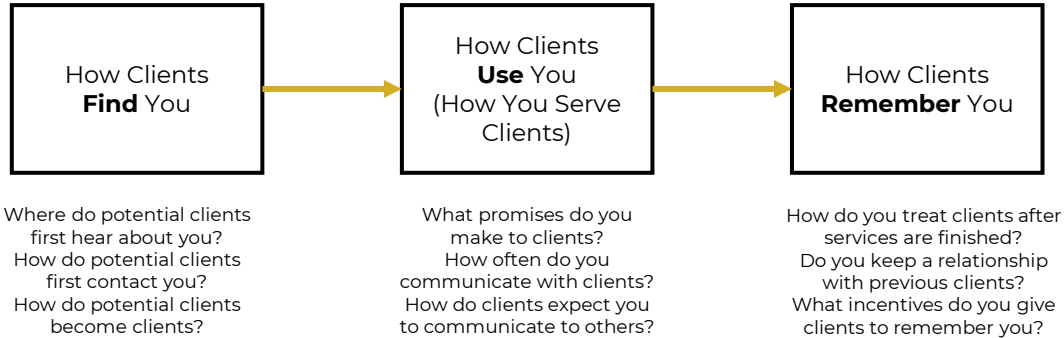
- Address potential pain points or bottlenecks in the process
- Better Marketing Initiatives
- Helps Identify Opportunities for upselling or cross-selling services.
- Set expectations for clients and ensure that they are satisfied with the services provided.

Key Phases In A Client Journey



DEFINING YOUR CLIENT JOURNEY

Key Phases In A Client Journey



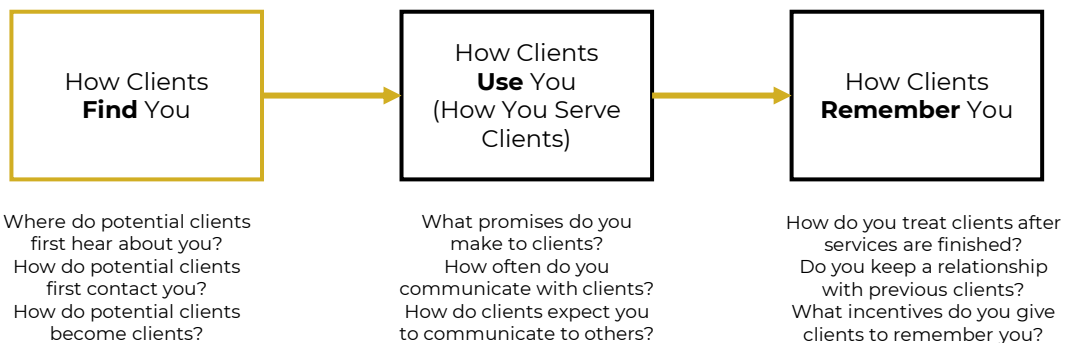
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11

DEFINING YOUR CLIENT JOURNEY

Key Phases In A Client Journey



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12

How Potential Clients Find You

Key Questions

- How do clients find out about you?
- What do your ideal clients read/watch/listen/do?
- Where are the opportunities to be part of those activities?

The Core Question

How does a potential client first learn about your legal services?

Traditional

- Newspapers
- Radio
- TV

Modern

- Digital Advertising
- Social Media
- Webinars
- Email Lists
- Online Referrals

How Are You Retained

Key Questions

- What is your sales process?
- Who is accountable?
- How do you follow up?

The Core Question

How does someone become a client after they first contact you?

Traditional

- Walk ins
- Phone calls
- Email

Modern

- Intake Form
- Initial Call
- Strategy Sessions

Key Phases In A Client Journey



How Clients “Use” You

Key Questions

- How do you communicate?
- When do you communicate?
- Tone of communications

The Core Question

How do you serve your clients?

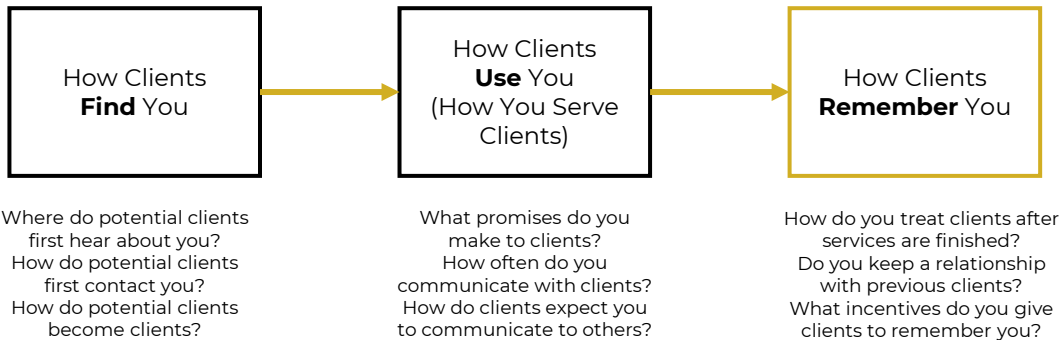
Traditional

- Retainer
- Milestones
- Closing Letter

Modern

- Bcc on Emails
- Video conferences
- Transcripts
- Call Summaries
- Newsletter

Key Phases In A Client Journey



How Clients Remember You

Key Questions

- How do you communicate?
- When do you communicate?
- Tone of communications

The Core Question

What does your client experience after services are completed?

Traditional

- Closing Letter

Modern

- Surveys
- Newsletter
- Webinars
- Review Requests

Your Modern Marketing Advisors



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MODERN MARKETING ADVISORS

External Brand Advisors

Brand Photographer

Begin curating a set of professional images that best represents you and your business visually.

Image Advisor / Consultant

Informs the improvement, redesign or reimagining of your professional image so you are better able to attract your ideal clients.

Digital / Social Media Consultants

Helps build a stronger presence on social media and through other forms of digital communication.

Website Designer

Helps maintain your online presence – often, the first point of contact for your client.

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Internal Advisors

Automation Consultant

Supports the integration of automation into your legal practice.

Digital Practice Advisor

Helps design more efficient processes and choosing the most appropriate technology for your legal practice.

Blog Writers

Helps build a stronger presence on social media and through other forms of digital communication.



Lawtreprenuer helps solo and small firm lawyers deliver more value to clients, practice more efficiently and live more balanced lives.

We do so by providing the virtual learning experiences and support our clients need to **design processes** and **integrate technology** into their business.

lawtreprenuer.co

Looking to learn how to use ChatGPT in your practice?

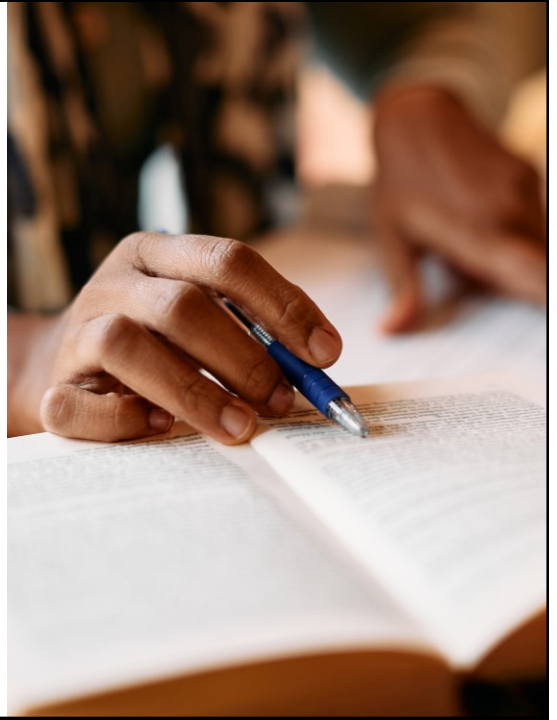
Discover how to use AI to enhance your practice, become more efficient and be more profitable with our **ChatGPT Toolkit for Solo Lawyers.**

Click to learn more:
go.lawtreprenuer.co/chatgptkit



YOUR PRACTICAL WORKBOOK

The Modern Lawyer's Marketing Blueprint



23

THE MODERN LAWYERS
MARKETING BLUEPRINT

Crafting Your Value Proposition

[Your Name / Name Of Your Practice]

helps

[Your Ideal Client]

deal with

[Problem]

by providing

[Solution].

As a result, our clients benefit because

[Differentiator].

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Defining Your Client Journey

This is one approach you can adopt when mapping one aspect of the journey your client takes in your practice.

Consider replicating this approach for each phase of interactions you have with your clients.

How Do Clients Remember You

First, list the various interactions you **currently** have with clients after you finish providing legal services to that client.

Then, consider how you want these clients to remember you and your services after completed.

Lastly, list the things you can do to foster these feelings.

Feel free to use a separate piece of paper.

Current Interactions

How Do You Want Clients To Feel?

Steps to take to foster feelings.

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Identifying Your Key Marketing Advisors

Your marketing advisors are the professionals you rely on to connect and build relationships with your ideal clients and/or customers.

Brand Photographer	
Image Advisor	
Digital Consultant	
Website Designer	
Automation Consultant	
Digital Practice Advisor	
Blog Writers	

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Lawpreneur helps solo and small firm lawyers deliver more value to clients, practice more efficiently and live more balanced lives.

We do so by providing the virtual learning experiences and support our clients need to **design** processes and **integrate** technology into their business.

lawpreneur.co

Looking to learn how to use ChatGPT in your practice?

Discover how to use AI to enhance your practice, become more efficient and be more profitable with our **ChatGPT Toolkit for Solo Lawyers.**

Click to learn more:

go.lawpreneur.co/chatgptkit



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TAB 3

17th Solo and Small Firm Conference: Secrets for Success

Implementing Legal Tech (PowerPoint)

Amy Grubb

Grubb Legal Consulting

June 8, 2023



Implementing Legal Tech

and Getting Buy-in From Your Team

1 Choose your product leader



to manage the process and keep things on track.

Who's your leader? Why?

2

2 Outline your project details



including deadlines, tasks, and workflows.

What are the highest priority tasks?

3

3 Pick your project champion



to help generate excitement and get buy-in from your team.

Who's your champion? Why?

4

4 Demo the new software



to showcase its benefits to your team.

How will this new software benefit the firm?

5

5 Appoint a tech leader



to stay up to date on current technology and future needs.

Who is your tech leader? Why?

Get more details on best practices for implementing new tech in chapter 5 of our Complete Guide to Legal Tech!



SCAN ME



Lawyerist



Law Society
of Ontario

Barreau
de l'Ontario

TAB 4

17th Solo and Small Firm Conference: Secrets for Success

Pride and Pronouns: Navigating Diversity (PowerPoint)

Renée Fuchs

Legal Aid Ontario

Milena Soczka

Legal Aid Ontario Duty Counsel Office

June 8, 2023





Pride and Pronouns

Navigating Diversity +

Presenters:

- Milena Soczka, Manager of Legal Services North(east) District
- Renée Fuchs, Staff Lawyer at Legal Aid Ontario

1

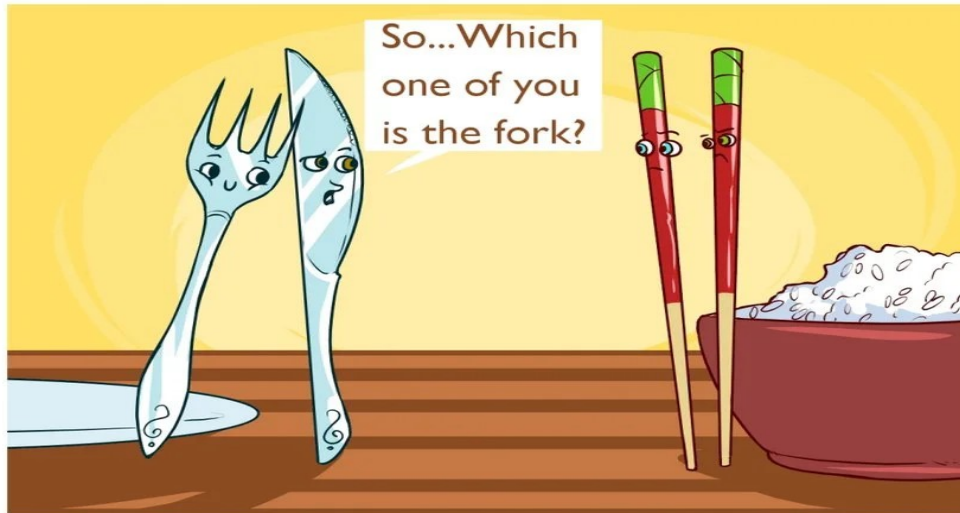
Objectives

The objective is for us, as legal professionals, to be more inclusive when interacting with people who do not fall into the broader cis gender heteronormative category of people. This includes a discussion on how to possibly signal your allyship, respect and/or acceptance, including through the use of gender neutral language when and where appropriate. We intend to cover material that should allow you to:

- Explain what gender identity means.
- Use gender neutral language.
- Have a better understanding of concepts relating to the 2SLGBTQ+ community

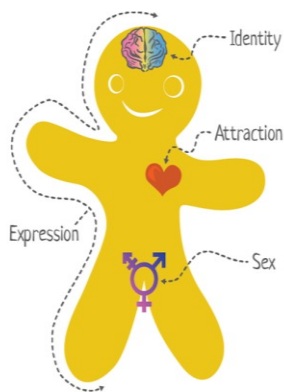


2



3

The Genderbread Person v4 by its pronounced **METRO**sexual



⊗ means a lack of what's on the right side

Gender Identity

⊗ → Woman-ness
⊗ → Man-ness

Gender Expression

⊗ → Femininity
⊗ → Masculinity

Anatomical Sex

⊗ → Female-ness
⊗ → Male-ness

Identity ≠ Expression ≠ Sex
Gender ≠ Sexual Orientation

Sex Assigned At Birth
□ Female □ Intersex □ Male

Sexually Attracted to... and/or (a/o)

⊗ → Women a/o Feminine a/o Female People
⊗ → Men a/o Masculine a/o Male People

Romantically Attracted to...

⊗ → Women a/o Feminine a/o Female People
⊗ → Men a/o Masculine a/o Male People

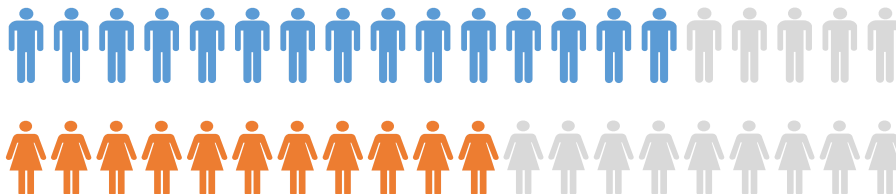
Genderbread Person Version 4 created and uncopyrighted 2017 by Sam Källermann

For a bigger bite, read more at www.genderbread.org

4

Definitions

[OPS Bilingual Glossary on gender identity](#)



Transgender

Refers to a person whose gender identity differs from the one associated with their birth-assigned sex.

Non-Binary

Refers to a person whose gender identity does not align with the binary concept of gender such as man or woman.

Transsexual

A person who has a desire or has had treatment to make their physical appearance more consistent with their gender identity.

20% of the trans community have non-binary identities.

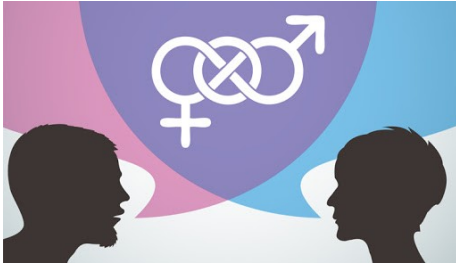
5

Did you know?

- 11% of LGBTQ+ adults and 26% of youth are non-binary (Williams Institute/Trevor Project)
- Non-binary youth who reported that “no one” respected their pronouns had **more than 2.5x the rate of attempting suicide** compared to those who reported that “all or most of the people” they know respected their pronouns (Trevor Project)
- 35% of youth know someone who uses gender-neutral pronouns (Pew research institute)
- 17% of youth assigned male at birth are non-binary (Trevor Project)
- 28% of assigned female at birth are non-binary (Trevor Project)

6

What is gender neutral language?



- Gender-neutral language is language that avoids bias toward a particular sex or social gender.
- You can refer to individuals without assuming their gender and without assuming they are men or women.




7

Why gender neutral language important?

- Gender neutral language is important when communicating or writing about clients because it is more accurate, respectful and is consistent with the values of equality recognized in the [Canadian Charter of Rights and Freedoms](#).
- In 1985, the Government of Ontario adopted an official policy of using gender-neutral language in all official publications.
- The purpose of gender-neutral language is to avoid word choices which may be interpreted as biased, discriminatory or demeaning by implying that one sex or social gender is the norm.

8

Using gender neutral language

Listen	Mirror and Match	Ask questions
Observe and listen to the client's verbal cues; <ul style="list-style-type: none">▪ Key words▪ Phrases	Identify one of the client's key words you heard; and mirror it back when it is your turn to speak.	You may ask indirect questions such as; <ul style="list-style-type: none">▪ can I refer to you by your first name?; or▪ how would you prefer that I address you?
		

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Gender neutral pronouns

When you must use a gender specific pronoun, use the term preferred or considered appropriate by the client. In English, the terms below are used:



However, the French language does not offer this flexibility (however, there are folks working on it! In November 2021, the widely used French dictionary *Le Robert* added the non-binary pronoun “iel” to its online edition)

A brief article on the progress being made with respect to the French language and pronouns:
<https://blog.lingoda.com/en/french-gender-neutral-pronouns/>

Your listening skills are key and the best option is to mirror the client during the interaction.

10

Gender neutral terms

Instead of	Use
She/He/Herself/Himself Her/Him Hers/His	They, Themselves Them Theirs
Husband/wife	Spouse, partner, other party, any person (or any number of less formal, gender neutral alternatives)
Common law husband/wife	Spouse, partner, other party, any person (or any number of less formal, gender neutral alternatives)
Daughter/son	Child/children/offspring (or any number of less formal, gender neutral alternatives)

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THE RICHNESS OF PRONOUNS

There are more pronouns than you may think...



12

Avoid assumptions

- Are you making any unconscious assumptions about a person's gender based on their name?
Consider the long list of gender neutral (unisex) names you are already familiar with...
- Are you speculating that gender based on the person's name or tone of voice?

Instead of making assumptions:



Ask a person or client about their gender identification.

- Rework anything that ignores or may ignore diversity in order to establish rapport with individuals.
- Be sensitive to differences.
- Avoid using Miss/Mrs./Mr. unless the person expressly indicates that they wish to be addressed in this manner.

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LGBTQ+ flags



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Original Pride flag - Transgender Pride flag - Progress Pride flag

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TAB 5

17th Solo and Small Firm Conference: Secrets for Success

Bring Your Own Device - Learn How to Use Microsoft 365 Tools and Outlook to Your Advantage

Paul Unger

Affinity Consulting Group

Barron Henley

Affinity Consulting Group

Danielle Davisroe

Affinity Consulting Group

June 8, 2023



A Lawyer's Guide to Microsoft 365 - You Probably Have No Idea What You're Missing

Contributor and Presentation by Paul J. Unger, Esq.
punger@affinityconsulting.com

Written by: Barron K. Henley, Esq.
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Columbus, OH 43220
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www.affinityconsulting.com
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Microsoft 365 - You Probably Have No Idea What You're Missing

Table of Contents

I.	Definitions and Explanations.....	1
II.	Microsoft 365 Versions and Services	4
III.	Included Programs and Applications	5
IV.	Many Other Programs Integrate with MICROSOFT 365.....	11
V.	MICROSOFT 365 Continuously Updates The Software	11
VI.	Would Microsoft 365 Work For Your Firm?	11

Microsoft 365 - You Probably Have No Idea What You're Missing

- I. **DEFINITIONS AND EXPLANATIONS:** Before we talk about functionality, we first need to define a few things to make sure we're on the same page.

A. **Microsoft 365:**

Microsoft 365 (formerly "Office 365") refers to subscription plans that include access to Office applications plus other productivity services that are enabled over the Internet (cloud services). Microsoft 365 includes plans for use at home and for business. Learn about Microsoft 365 for use at home. Microsoft 365 plans for business include services such as Skype for Business web conferencing and Exchange Online hosted email for business, and additional online storage with OneDrive for Business.

Many Microsoft 365 plans also include the desktop version of the latest Office applications, which users can install across multiple computers and devices. The fully installed applications include: Word, Excel, PowerPoint, OneNote, Outlook, Publisher, and Access. (Publisher and Access are available on PC only.) And you can install them across multiple devices, including PCs, Macs, Android tablets, Android phones, iPad, and iPhone. When you have an active Microsoft 365 subscription that includes the desktop version of Office, you always have the most up-to-date version of the applications.

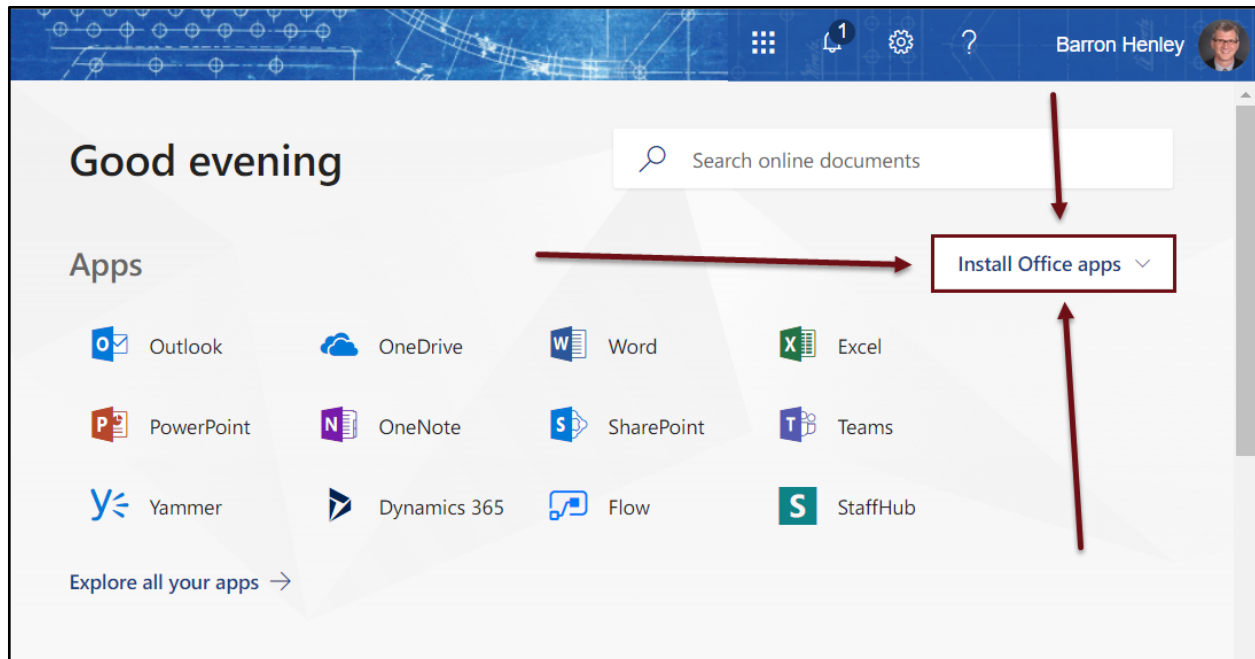
- B. **Microsoft Office:** "Microsoft Office" is the name we still use for our familiar productivity software. Office suites are available as a one-time purchase and include applications such as Word, Excel, and PowerPoint, which can be installed on only one PC or Mac. The applications are not automatically updated; to get the latest version, you can purchase the product again when the new version becomes available. The latest versions currently available for one-time purchase are Office 2019 for Windows and Office 2019 for Mac. These suites are essentially a snapshot in time of Office via Microsoft 365 and do not come with any of the cloud-based services included in Microsoft 365.
- C. **Office Online:** There are web versions of Word, Excel, etc., that you can use whether you have a Microsoft 365 account or not. They don't have all the functionality of the desktop versions, but you can do a lot with them.
- D. **Microsoft 365 Security:** You can read all about Microsoft 365's security at <https://www.microsoft.com/en-us/trustcenter/security/office365-security>. In a

nutshell, Microsoft 365 offers world-class security. It has the same user-level security options and Trust Center as the desktop version of Office. Rights management Service (RMS) supports encryption and lets you set permissions. Offsite, files are saved in specialized data centers where security is a primary concern. As a result, small to medium businesses will have better security using Microsoft 365 than they can probably afford on their own.

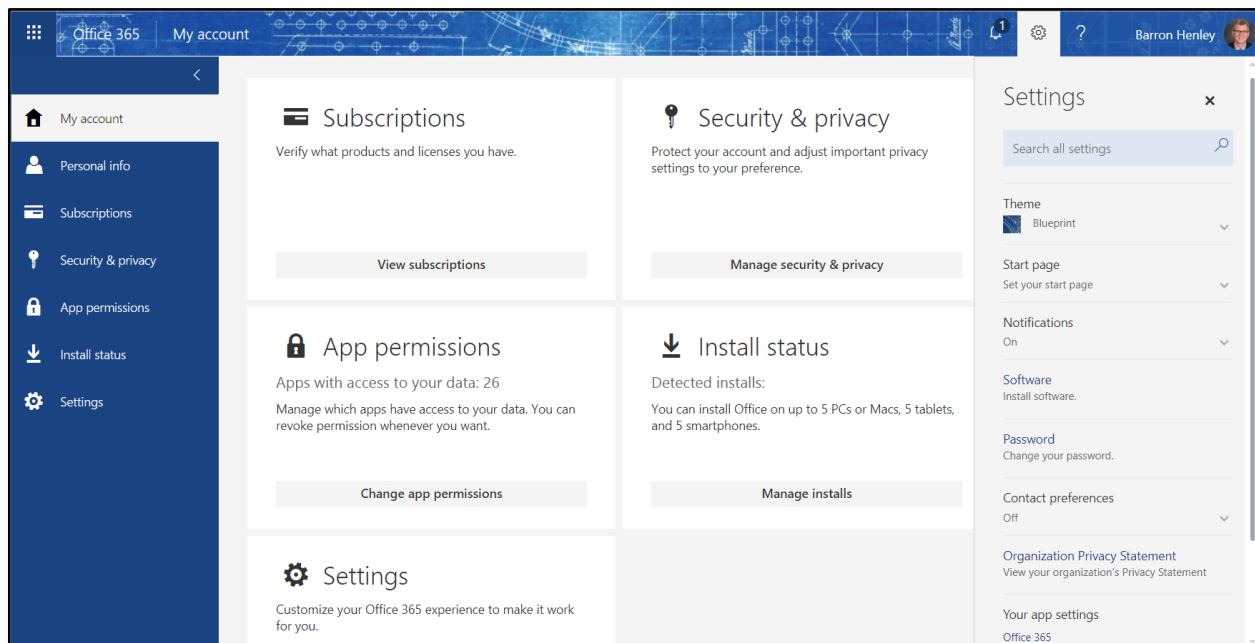
According to Microsoft, here are Microsoft 365's Top 10 Security and Privacy Features:

- We restrict physical data center access to authorized personnel and have implemented multiple layers of physical security, such as biometric readers, motion sensors, 24-hour secured access, video camera surveillance, and security breach alarms.
- We enable encryption of data both at rest and via the network as it is transmitted between a data center and a user.
- We don't mine or access your data for advertising purposes.
- We use customer data only to provide the service; we don't otherwise look in your mailbox without your permission.
- We regularly back up your data.
- We won't delete all the data in your account at the end of your service term until you have had time to take advantage of the data portability that we offer.
- We host your customer data in-region.
- We enforce "hard" passwords to increase security of your data.
- We allow you to turn off and on privacy impacting features to meet your needs.
- We contractually commit to the promises made here with the data processing terms in your volume licensing agreement.









E. Microsoft 365 Desktop - Running Offline: You can use Microsoft 365 offline (without internet access) if you download and install the desktop version of Office with your plan. You must connect to the internet every 30 days to maintain your subscription and Microsoft 365 tells you when it's time to connect. To install the desktop versions of the software by clicking the Install Office apps button from the main Microsoft 365 screen (see below):



- F. Microsoft 365 Administrative Functions:** As you can see from the screen shot below, the layout is logical and easy to understand.









































- II. **MICROSOFT 365 VERSIONS AND SERVICES:** I have given up trying to keep up with the incessant changes Microsoft makes to the O365 plans. Here is a link to the latest summary of what is included in each of the business plans: <http://bit.ly/2qROE5g>. To see and/or buy the O365 plans most of our clients buy, see <http://bit.ly/2qTantS> (screen shot below). The most popular plan among our law firm clients is Business Premium.

Get first 6 months free with annual commitment. ³	Includes Microsoft Teams for easy remote working.	Includes Microsoft Teams for easy remote working.	Only includes apps
Microsoft 365 Business Basic (formerly Office 365 Business Essentials)	Microsoft 365 Business Standard (formerly Office 365 Business Premium)	Microsoft 365 Business Premium (formerly Microsoft 365 Business)	Microsoft 365 Apps for business (formerly Office 365 Business)
\$5.00 user/month (annual commitment)	\$12.50 user/month (annual commitment)	\$20.00 user/month (annual commitment)	\$8.25 user/month (annual commitment)
Buy now	Buy now	Buy now	Buy now
Promotional pricing reflected in cart. ⁵	Try free for 1 month⁴	Try free for 1 month⁴	
Best for businesses that need Microsoft Teams and cloud storage. Desktop versions of Office apps not included.	Best for businesses that need Office apps across devices plus business email, cloud file storage, and online meetings and chat.	Best for businesses that need everything included in Business Standard plus advanced cyberthreat protection and device management.	Best for businesses that need Office apps across devices and cloud file storage. Business email and Microsoft Teams not included.
Office apps included (Web and mobile versions of Word, Excel, and PowerPoint included.) ³	Office apps included	Office apps included	Office apps included
 	 	 	 
Outlook Word	Outlook Word	Outlook Word	Outlook Word

\$32.00 user/month (annual commitment)	\$57.00 user/month (annual commitment)	\$10.00 user/month (annual commitment)
Microsoft 365 E3	Microsoft 365 E5	Microsoft 365 F3
Get best-in-class productivity apps combined with core security and compliance capabilities for your enterprise.	Get best-in-class productivity apps and advanced security, compliance, voice and analytical capabilities for your enterprise.	Formerly Microsoft 365 F1 Empower your Firstline workforce with productivity apps and cloud services that allow them to do their best work.
Contact sales	Contact sales	Contact sales
Learn more >	Learn more >	Learn more >

If you want to look at the enterprise plans, see <http://bit.ly/2HEmhl1>. We subscribe to E3 because it includes message encryption, among other things.

Office 365 ProPlus	Office 365 E1	Office 365 E3	Office 365 E5
CAD \$16.00	CAD \$10.20	CAD \$26.60	CAD \$44.80
user/month (annual commitment) Plus applicable tax	user/month (annual commitment) Plus applicable tax	user/month (annual commitment) Plus applicable tax	user/month (annual commitment) Plus applicable tax
Buy now	Buy now	Buy now	Buy now
Learn more >	Learn more >	Try for free > Learn more >	Try for free > Contact sales > Learn more >
Office applications plus cloud file-storage and sharing. Business email not included.	Business services—email, file storage and sharing, Office Online, meetings and IM, and more. Office applications not included.	All the features of ProPlus and Office 365 E1 plus security and compliance tools, such as legal hold, data loss prevention, and more.	All the features of Office 365 E3 plus advanced security, analytics, and voice capabilities.
Office applications included	Office applications included	Office applications included	Office applications included
    Outlook Word Excel PowerPoint	(Not included)	    Outlook Word Excel PowerPoint	    Outlook Word Excel PowerPoint
  Access (PC only) Publisher (PC only)		  Access (PC only) Publisher (PC only)	  Access (PC only) Publisher (PC only)
Services included	Services included	Services included	Services included
 OneDrive	    Exchange OneDrive SharePoint Teams	    Exchange OneDrive SharePoint Teams	    Exchange OneDrive SharePoint Teams
	  Yammer Stream	  Yammer Stream	   Yammer Power BI Stream

III. INCLUDED PROGRAMS AND APPLICATIONS:

A. Microsoft Exchange: This is included in some of the Microsoft 365 plans. We would argue that this feature alone is worth the price of admission. Microsoft Exchange is a program that, among other things, allows Outlook users to synchronize their data (email, contacts, calendars, tasks, etc.) on a server. However, there are much bigger benefits:

- Share Data:** Exchange also allows users to share information in Outlook. For example, I could allow someone else in my office to access my calendar electronically and add appointments. If you're going to use an electronic calendar (which we recommend), then you need to have an arrangement whereby others in your office can access it when you're not around.
- Smartphone & Tablet Sync:** Exchange will wirelessly sync with any smartphone or tablet running Android, iOS, Blackberry OS or Windows

Phone. This means that everything in Outlook (contacts, tasks, calendar & email) will be available from any device you own as long as the device is connected to the Internet. If you want to rely on an electronic calendar, then you have to be able to take it with you and Exchange allows this.

3. **Anywhere Email Access:** Exchange also allows users to gain access to office email while out of the office in many different devices. For example, I can see my inbox, calendar & contacts on my iPad (or any tablet), on any Windows or Mac computer connected to the Internet, or on my smartphone. I can use Outlook Web Access (which comes with hosted Exchange) via a browser; or I can run Outlook natively on my laptop (for example) and as long as I'm connected to the Internet, I'm also connected to Exchange.
 4. **Full Synchronization which acts as a Back Up:** Everything in Outlook is synchronized in Exchange (email, contacts, calendar & tasks), which serves as a replication or a backup. Note though, this is not a multiple point-in time backup. It is synchronizing your data to Microsoft's servers. For example, you are not able to request a recovery from 2 days ago or 7 days ago, etc.
 5. **Operating System Agnostic:** Exchange and Outlook will work with both Windows and Mac computers.
- B. To-Do:** This is a fantastic task management application that is actually free regardless of whether you have a Microsoft 365 subscription. That said, if you want Microsoft ToDo to synchronize across devices, you will need a subscription.
- C. FindTime:** Microsoft FindTime is a scheduling tool designed to simplify the process of finding suitable meeting times among multiple participants. It is very similar to Doodle if you are familiar with it. With FindTime, users can easily coordinate and schedule meetings by automatically detecting availability and suggesting optimal time slots based on participants' calendars. This intuitive Microsoft Outlook add-in eliminates the back-and-forth communication typically associated with scheduling, allowing users to efficiently send meeting invitations and receive responses, all within a unified interface. FindTime streamlines the coordination process, ensuring efficient collaboration and enhanced productivity for individuals and teams alike.
- D. Bookings:** Microsoft Bookings is a appointment and scheduling management tool that enables businesses to efficiently organize and manage customer appointments. With Bookings, businesses can create customized booking pages that allow customers to easily schedule appointments, services, or meetings. The platform syncs with staff members' calendars, ensuring real-time availability updates and avoiding double bookings. It also provides automated reminders and

notifications to reduce no-shows and enhance customer engagement. Bookings offers flexibility in terms of customization, allowing businesses to define services, durations, and availability based on their specific needs. With its intuitive interface and seamless integration with other Microsoft tools, Bookings streamlines the booking process, enhances customer satisfaction, and optimizes business operations.

- E. **Lists:** Microsoft Lists is a productivity tool that helps users organize, track, and manage information effectively. It provides a structured way to create, share, and collaborate on lists, allowing users to track anything from simple to complex data sets. With Microsoft Lists, users can create customizable templates, set up columns and rules, add attachments, and apply conditional formatting to highlight important information. It offers features such as sorting, filtering, and grouping to easily analyze and visualize data. Users can access and update lists across multiple devices and platforms, making it convenient for remote collaboration. Microsoft Lists streamlines workflows, improves team productivity, and enables efficient information management in a user-friendly and flexible manner.
- F. **Planner:** Take the chaos out of teamwork and get more done! Planner makes it easy for your team to create new plans, organize and assign tasks, share files, chat about what you're working on, and get updates on progress.
 - 1. **Easy to use:** Launch Planner from the Microsoft 365 app launcher with a single click. You can then create a new plan, build a team, assign tasks, and update status—in a few easy steps.
 - 2. **Organize work visually:** Each plan has its own board, where you can organize tasks into buckets. You can categorize tasks based on their status or on whom they're assigned to. To update the status or change assignments, just drag and drop tasks between columns.
 - 3. **Visibility and transparency:** The My Tasks view provides a comprehensive list of all your tasks and their status across all your plans. When working together on a plan, team members always know who is working on what.
 - 4. **Collaborate around tasks:** Built for Microsoft 365, Planner lets you attach files to tasks, work together on those files, and even have conversations around tasks without switching between apps. With Planner, all your team's discussions and deliverables stay with the plan and don't get locked away across disparate applications.
 - 5. **Works across devices:** Planner works across all your devices. And with Planner, everyone is always on the same page. A glance at Charts is all it takes to know where things stand and if the team is making enough progress towards their goal.

6. **Email notifications:** With Planner, you'll never miss a beat! Receive email notifications whenever you're assigned a new task or added to a conversation.¹

- G. SharePoint:** "SharePoint is Microsoft's premier collaborative server environment, providing tools for sharing documents and data across various organizations within a company's network. Typically deployed on a company's network as a series of intranet sites, SharePoint lets various departments control their own security, workgroups, documents, and data.

As with any other website, a SharePoint site — or an individual page within the site — is accessible by way of a URL that the user can access using a standard web browser.

SharePoint is most often used for the storing of version-controlled documents, such as Word documents and Excel worksheets. In many environments, email is used for passing documents back and forth between users. The potential for mixing up different versions of the same document is considerable. Also, storing multiple copies of the same document takes up a lot of disk space. Because SharePoint provides a single source for storing, viewing, and updating documents, many of these issues are eliminated.

And because SharePoint easily handles virtually any type of document, it is frequently used to consolidate and store various types of documentation (project drawings, videos, schematics, photographs, and workbooks, for example) that are required for large projects where multiple teams must collaborate."²

- H. Shifts:** Microsoft Shifts is a cloud-based platform designed for organizations who need to manage shifts for their workforce. For instance, in a law firm, that might be a pool of typists or transcriptionists. Shifts helps you create and manage work shifts, share files, and communicate important information with team members. It's available to Microsoft 365 for business subscribers and comes with a web app for managers and mobile app for employees. The mobile app supports both iOS and Android.
- I. Stream:** Microsoft Stream is a cloud video service that provides a secure way for employees at organizations of all sizes to upload, watch, share, organize and discover all videos within their organization from a single portal. Some organizations use Stream to house their internal onboarding and/or instructional how-to videos.

¹ See <https://products.office.com/en-us/business/task-management-software>

² What Is SharePoint? by Michael Alexander, see <http://bit.ly/2qUDiO0>

- J. **Sway:** According to Microsoft: Sway makes it quick and easy to create and share polished, interactive reports, presentations, personal stories, and more. Add your content, and we'll do the rest. Bring your Sway to life with interactive content. Include a video to talk about your idea or add an interactive chart to let others dive into the details. Sway suggests searches to help you find relevant images, videos, tweets, and other content that you can drag and drop right into your creation. No need to juggle apps and web pages to find what you want. You don't need to worry about formatting, Sway's built-in design engine takes care of it. If the first design isn't right for you, Remix! it to see others or customize it to make it your own. It's super easy to share a Sway. Family, friends, classmates, and coworkers can see your creation on the web without signing up or downloading additional software. And you can change privacy settings for more control.³
- K. **Teams:** This description is from TechTarget: Launched in beta in November 2016, Microsoft Teams is a chat-based collaboration tool that is part of the Microsoft 365 suite of services. Teams enables remote, global and dispersed teams to work together and collaborate through a common workspace, team chat, one-on-one chat, document collaboration and more. Teams is integrated with a variety of other Microsoft 365 services, including SharePoint, Skype, Yammer and Exchange.

Microsoft announced that they will “retire” Skype for Business July 31, 2021. Since September 2019, all customers signing up for Microsoft 365 are automatically set up to use Microsoft Teams only. If you currently use Skype for Business, we strongly recommend that you start planning your transition, if you haven’t already done so. All capabilities that were available in Skype for Business will be available in Microsoft Teams. In addition to the functionality you had in Skype for Business, Microsoft Teams serves as a modern “hub” for all communication and collaboration. The Teams interface is more complex than the simple interface in Skype for Business, so we do recommend training.

Teams offers three clusters of functionality and is poised to compete with services like Slack, Jabber, Jive, HipChat, Salesforce Chatter and others. It touts itself as a native chat tool for Microsoft shops using other Microsoft 365 services. While the core of the tool is real-time chat among teams, Teams enables other core collaboration platform functions by using APIs to integrate document management, video and other applications. Teams includes the following core capabilities:

1. **Chat.** While conversations are visible to the entire team, they can also be made private. Skype video is deeply integrated into the application, and team members can add emojis and custom memes to discussions.

³ See <https://sway.com/>

2. **Hub.** Microsoft Teams provides a consolidated space for various Office applications, including Word, Excel, PowerPoint, SharePoint, OneNote, Planner, Power BI and Delve. It enables teams to work natively and collaboratively, without having to toggle between applications as they collaborate.
 3. **Easy customization of teams.** The tool features APIs that plug into various cloud-based documents and cloud services. Microsoft Teams utilizes the same Connector model as Exchange, which enables notifications and updates from Twitter and other third-party applications.⁴
- L. Forms:** According to Microsoft, "[w]ith Microsoft Forms, you can create surveys, quizzes, and polls, and easily see results as they come in. When you create a quiz or form, you can invite others to respond to it using any web browser, even on mobile devices. As results are submitted, you can use built-in analytics to evaluate responses. Form data, such as quiz results, can be easily exported to Excel for additional analysis or grading."⁵
- M. OneDrive:** According to Microsoft, "Securely store and share files from anywhere. OneDrive offers native desktop, browser and mobile experiences on your devices. Access and make changes that sync automatically in the cloud or sync local copies of files for offline viewing and editing on your PC or Mac. Confidently share your files so other people can access them seamlessly and securely."⁶
- N. OneNote:** "Designed to function as an electronic version of a paper notebook, Microsoft OneNote is a note-taking and personal information management (PIM) application for collecting, organizing and sharing digital information. By storing text notes, photos, audio and video snippets, handwriting and similar content, Microsoft OneNote collects and organizes the information, making it available for searching as well as sharing with others."⁷ This application is also free regardless of whether you subscribe to Microsoft 365.
- O. Dynamics 365:** Microsoft recently took the wraps off of Microsoft Dynamics 365, a new cloud powered service that repackages and rebrands several Microsoft Dynamics programs into an offering that is both. The cloud-enabled Software-as-a-Service project combines the customer relationship management (CRM) and enterprise resource planning (ERP) of previous versions of Microsoft Dynamics with additional features including Microsoft Flow and Microsoft PowerApps.⁸

⁴ See <http://searchcontentmanagement.techtarget.com/definition/Microsoft-Teams>

⁵ See <https://support.office.com/en-us/forms>

⁶ See <http://bit.ly/2qT1bFS>

⁷ See https://www.webopedia.com/TERM/M/microsoft_onenote.html

⁸ Microsoft Dynamics 365: Everything You Need to Know by Michael Simmons, 10/31/16, Tom's IT Pro, see <http://bit.ly/2vCSDHP>.

P. Power Automate: Microsoft Power Automate (formerly called Flow) is a cloud-based service that makes it practical and simple for line-of-business users to build workflows that automate time-consuming business tasks and processes across applications and services.⁹

Q. Power BI: Power BI is a robust business intelligence platform that enables organizations to analyze and visualize their data in dashboards that drive informed decision-making. It allows users to connect to a wide range of data sources, transform raw data into rich, informative dashboards, reports, and visualizations. With Power BI's drag-and-drop interface and powerful data modeling capabilities, users can explore data, uncover insights, and make data-driven decisions. The platform offers a variety of advanced features, such as data cleansing, modeling, and sophisticated analytics tools like AI-powered visuals and natural language querying. Power BI also provides seamless collaboration and sharing options, enabling teams to collaborate on data analysis and share reports securely.

IV. MANY OTHER PROGRAMS INTEGRATE WITH MICROSOFT 365: Nearly every legal case management system and all document management systems integrate with Microsoft 365. For example, this is from Clio's website (a legal case management system):

All your organizational needs in sync.

A natural fit for every law firm—sync Clio with Google or Microsoft Office 365 Business or Enterprise accounts. Link key business tools such as contacts, documents and calendars with Clio to instantly reduce data entry, minimize errors, and simplify law firm organization.



V. MICROSOFT 365 CONTINUOUSLY UPDATES THE SOFTWARE: In other words, Microsoft will constantly send you updates that will install in the background to the Microsoft 365 product suite. To get an idea of what I'm talking about, see What's New In Microsoft 365 here (<http://tinyurl.com/n9x9f4j>). If you scroll down to the bottom of that page, you'll see that Microsoft updated Microsoft 365 in Sept. & Nov. of 2015, every single month of 2016, and Jan, Feb. and May of 2017. A great review of Microsoft 365 which shows the content of each update can be see here: <http://tinyurl.com/mz574zl>.

VI. WOULD MICROSOFT 365 WORK FOR YOUR FIRM? In short, yes. We have many clients using it and loving it. For more information on this, see:

A. How Law Firms Can Take Advantage of Microsoft 365 by Catherine Sanders Reach, October 27, 2020. See <https://www.ncbar.org/2020/10/27/how-law-firms-can-take-advantage-of-microsoft-365/>.

⁹ See <https://flow.microsoft.com/en-us/documentation/frequently-asked-questions/>

- B. **Office 365: Why A Law Firm Switched** by Kevin Casey, InformationWeek, March 20, 2013. See <http://tinyurl.com/p54ud8l>
- C. **From Google Apps to Office 365: Why My Company Ditched Google** by Derrick Wlodarz, betanews, January, 2014. See <http://tinyurl.com/lkkapaa>.



MICROSOFT OUTLOOK

FOR LEGAL PROFESSIONALS

Covering Outlook for Windows Versions
2013, 2016, 2019, 2021 and Microsoft 365

MICROSOFT OUTLOOK

FOR LEGAL PROFESSIONALS

PERSONAL LICENSE

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Mac users: If you are using this manual with Outlook for Mac, some of the steps will be different. Further, some features available in Outlook for Windows are not available in Outlook for Mac.

The materials in this book were written using Microsoft 365 and all steps and instructions were tested prior to the publication date. As Microsoft continuously updates Microsoft 365, your software experience may vary slightly from what is seen in this manual.

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MEET OUR TEAM OF OUTLOOK EXPERTS

Meet our team of Outlook experts who have co-authored this manual.



BARRON HENLEY

Most people wouldn't relish the idea of spending a day in a conference room, teaching Microsoft Outlook. Barron is not most people. There are few things Barron enjoys more than teaching all-day software training classes.

As an attorney, he understands how challenging it is to practice law without the proper training on the technology tools. When Barron isn't training people on Word or helping transition organizations transition from WordPerfect, he focuses on automating documents and teaching CLE classes for attorneys across North America.

PAUL UNGER

While most people understand the day-to-day struggle of keeping up with email, Paul knows how to tackle the problem better than anyone. Paul's passion is coaching lawyers on managing time, distractions, tasks, emails, and documents efficiently. As the author of *Tame the Digital Chaos – A Lawyer's Guide to Time, Task, Email and Distraction Management*, Paul is truly an expert on the topic.

Paul's expertise is well-founded from his time practicing law. When Paul isn't coaching lawyers, he teaches CLE classes for attorneys across North America.



DANIELLE DAVISROE

Passionate about remote learning, Danielle is the force behind Affinity's membership training program, Affinity Insight. Danielle focuses on creating easily accessible training materials and webinars tailored to meet each organization's needs. From one-on-one training to organization-wide training plans, Danielle has her clients covered.

When Danielle isn't providing remote training, she focuses on teaching CLE via webinar and providing legal organizations with the advice they need to run smoothly. With a background practicing law at a boutique firm, Danielle understands the challenges that legal professionals face every day.



MICROSOFT OUTLOOK FOR LEGAL PROFESSIONALS

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CHAPTER 1

MANAGING EMAIL IN A LEGAL ENVIRONMENT

Can't find it? Something missing? Instructions not clear? Email manuals@affinityconsulting.com.

This manual would be remiss not to discuss why legal professionals need to be more efficient in using Outlook in the first place.

The Email Problem

Email Overload

Studies indicate that lawyers receive around 120 and send roughly 40 emails per day.¹ Without question, email is one of the most important technological communication advancements of the past 100 years. It has fundamentally changed the way we communicate with clients and do business. Major corporations and law firms are run via email communication instead of face-to-face communication.

For lawyers, emails present a wide array of issues that most of the business world and ordinary consumers will never face. In this seminar, we will discuss these issues and teach you how best to deal with them.

These issues or problems range from ethical considerations to email overload and time-management. While there is no perfect solution, there are many methods to effectively handle email.

The first step to any problem is to understand the problems that exist. We must get our arms around all the email issues that face lawyers. The second step is to isolate each problem and tackle each problem, without forgetting how that might affect other email problems. For instance, controlling spam email may prevent you from getting an important email from a client if your spam filter inadvertently catches an email from a client. In other words, when you solve one problem, it may open up a different can of worms.

Torrent of Interruptions

In an eight (8) hour workday, if we receive 100 emails, that equates to receiving one email every 4.8 minutes. Sound familiar? It should, because that is the world most of us live in. Combine that with instant messages, phone calls and what I call email curiosity interruptions, that equates to one interruption every 2-3 minutes! What can you do to minimize the distraction?

Take the following quick survey:

¹ See <https://www.templafy.com/blog/how-many-emails-are-sent-every-day-top-email-statistics-your-business-needs-to-know/>

1. Interruption Survey:

- Average number of emails you get per day: _____
- Average number of Instant messages per day: _____
- Average number of phone calls you get each day: _____
- Average number of curiosity email or internet breaks each day: _____
- Total Interruptions Per Day _____

2. Other Questions to Ask Yourself:

- How many times do you look at your email each day? _____
- What percentage of interruptions really need immediate attention? _____
- Has technology simplified your life? ☐ Yes ☐ No
- Does technology control your day? ☐ Yes ☐ No

Email Storage

What do we do with all of this email? There are several problems related to this:

- How should you archive old email?
- How do you deal with attachments and keep from losing them?
- How do you search for old conversations quickly and efficiently?
- How do you keep your email but not run out of server space? Why does the IT person keep telling you that you have too much email in your inbox and you're clogging up the server?

Too Much Legitimate Email to Deal with Effectively

Many people simply receive more email than they can read and keep up with. How do you sort, store and track all of this email?

No Expectation of Privacy

The old saying goes: You should never send an email that would embarrass you were it to appear on the front page of tomorrow's paper. Is there anything you can do to create an expectation of privacy?

Spam Getting Through

There are lots of ways to avoid SPAM, and yet it still manages to get into our mailboxes. What can you do about it?

Are You Using Outlook Effectively?

Probably not. Although millions of people use Outlook, most do not use all of its functionality to their advantage. In this seminar, we'll give you some great tips for making better use of Outlook.

Email Storage Problems

Disorganization

Many legal users have hundreds or thousands of unrelated messages in their inboxes. This is equivalent to taking all of the paper out of your files and throwing it on the floor of the file room. The point is, if it's not organized, then it's mostly useless.

Storage Space Limitations

You may have been scolded by your IT folks about this. If you're using Microsoft Exchange on your server, then it can get overloaded with the quantity of emails and attachments you keep in your inbox and Outlook folder structures. If you don't have Exchange, then all of those emails (and contacts, and appointments and tasks) are stored in a PST file on your hard drive or the server. The bigger that database, the slower your computer will run. Of course, the database can also over-run your storage capacity.

No One Else Can See Your Email but You

In most cases, if you have an important client communication in Outlook, no one else in your office can see it. In many cases, lawyers want to share this information, but don't know how to do it.

Difficulties Searching

Many people complain that it's nearly impossible to efficiently search old emails for a particular conversation. What can you do to make this task easier?

Dealing With the Overload

Deal with Email at Set Times

The first problem that we want to deal with is the reduction of interruptions so one can be more focused and productive. After all, how on earth can anyone get anything done with an interruption every 2-3 minutes?

Ask yourself the following question: 10 years ago, would you have let someone walk in your office every 2-3 minutes offering to sell you a sexual enhancement product... or asking you for a favor?

Of course, you wouldn't! So, why do you let it happen now with your email? Why do you drop everything that you are doing to read and/or respond to that email that just arrived?! You have invested thousands of dollars in this wonderful technology that is supposed to make you more efficient, but instead it has created an interruption hotline going straight to your brain.

Some time management experts suggest checking email 2 times a day. While this may sound like a good plan, it is probably unrealistic. When email was just becoming popular, there wasn't an expectation of that email would be dealt with immediately, so 2 times per day was probably okay. However, in today's age that has changed to some degree. Entire companies communicate via email ... it's a way of life and the way everyone communicates. Checking email twice a day isn't enough. I think 3-5 times a day is more realistic ... more satisfying to senders ... and just as important, will make it easier for you to prevent your inbox from growing out of control.

A good way to handle this is deal with email at the same time every day. For example, you could follow this schedule **and limit yourself to 10-15 minutes**.

1. Upon arrival at the office: 8:00 am
3. Mid-morning: 10:30 am
4. After lunch: 12:30 pm
5. Afternoon: 3:30 pm
6. End of day: 5:00 pm

Turn Off Outlook's Notifications About Email

You see that little envelope in the bottom, right corner of your screen and you can almost hear it saying, "read me!" The constant notifications of new email are one of the primary distractions for most people. So, turn them off! It's amazing how more focused you can be when your computer isn't announcing incoming email every few minutes (or seconds). **File ► Options** (left side) ► **Mail** (left side) ► clear all of the boxes under Message Arrival.

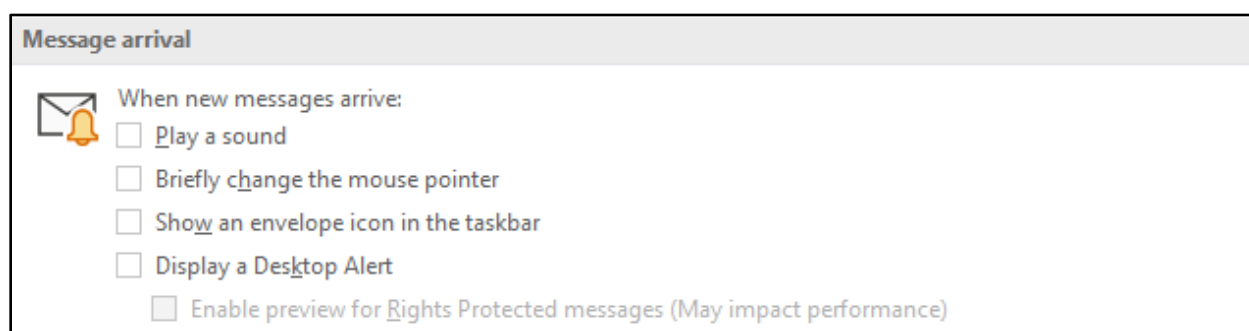


FIGURE 1-1

Treat Email Inbox like you U.S. Mailbox – Keep it Empty!

Would you ever keep your U.S. Mailbox in this condition? Of course, you wouldn't. So, don't let your inbox get that way! However, for most people, maintaining email is the weakest link in their system of organization primarily because of volume and frequency. They use it as a holding bucket for undecided and unresolved tasks.

The key to mastering your inbox is to keep it empty – or under 20. You certainly don't need to keep it at zero. In fact, if you tried, you would probably be wasting time, not saving time. Not to mention, you will also be developing bad obsessive/compulsive habits. Every time an email landed in your inbox, you would drop everything and try to deal with it. That would be horribly inefficient.

The truth is that to process email efficiently, you must be able to see your emails in a single screen (or close to it). It is very difficult and overwhelming to process emails and tasks when you are staring at a screen with 500 emails.

So, what do you do with your U.S. mailbox? One of the best time management/organization tips that I learned and implemented nearly ten years ago is this: Throw away your (U.S.) junk mail and advertisements before you get into the house. Only bring mail into your house that you intend to do something with!

Delete Whatever You Can Immediately!

Learn how to use the DELETE key. That could be the first thing that you do before you start dealing with email ... just like not bringing junk mail and annoying advertising into your home. Delete the following:

- All the email that gets past your SPAM filter.
- Interoffice SPAM that is irrelevant to you.
- Jokes from annoying friends and c-workers.
- Email from people you don't like (unless it's important, of course)

TIP: Sort email based on the **From** field (by hitting the **From** column header). You can often get rid of tons of email sent from the same person. Remember that you can select a chunk of email by single left clicking on the first email – holding the Shift-key down and single left click on the last email.

If You Can Deal with It in Under 3 Minutes, Do It Now

The 3-minute rule is gold! Any email that can be responded to or dealt with (saved in a client file, forwarded, deleted, etc.) within 3 minutes should be dealt with immediately – the first time you lay eyes on it. This rule is based on the premise that the 2nd time you have to deal with the email, it will take you longer than 3 minutes navigate to it, open it, read it, comprehend it, re-familiarize yourself with the topic and then handle it. So, why not just respond to it if you have the 3 minutes to deal with it!

TIP: Don't forget that you may be able to deal with it more quickly by picking up the phone or walking around the corner.

Remember, you are still supposed to be handling these emails only at scheduled/set times during the day! This will be a difficult temptation to overcome – especially if you have email notification turned on and see an email that you can dispose of quickly.

Finally, if it is an email that is going to take a while, you should dispose of it in under 3 minutes by adding it to your task list (or calendar) and then saving it into the appropriate client/matter file.

Delegate If Appropriate

If someone else should be handling the task or issue in the email, then hand it off appropriately. Don't let someone else put “the monkey” back on you, in the words of *The One Minute Manager Meets the Monkey* by Kenneth Blanchard. Do this immediately unless it is going to take you more than 3 minutes to delegate. You can make this easy to track by setting up the Delegated Email rule described under Keep Track of Delegated Email on page 45 below.

Delay If Necessary

Already mentioned in the 3-minute rule above, if it is an email that is going to take a while, you should simply dispose of it in under 3 minutes by adding it to your task list (or calendar) and then saving it into the appropriate client/matter file.

- Do not use Outlook as your to-do list by leaving unresolved email in your inbox.
- If you keep a paper-based task list, simply write it in and save the email in appropriate place.

- If you use Outlook to manage your task list, simply drag it over to your **Task button** in the Outlook navigator.
- In some circumstances, it is okay to set up subfolders under your inbox. Clean them out on a weekly basis.
- If you schedule your tasks as appointments, add it to your calendar.

CHAPTER 2

OUTLOOK'S "FLUENT USER" INTERFACE

Can't find it? Something missing? Instructions not clear? Email manuals@affinityconsulting.com.

Outlook is Organized into Folders

All items in Outlook are stored in Folders. Clicking on the navigation buttons in the bottom left Mail, Calendar, People, or Tasks changes the view to that folder.

Outlook 2013/16

To see all Outlook folders, click the **three dots** and choose **Folders**.

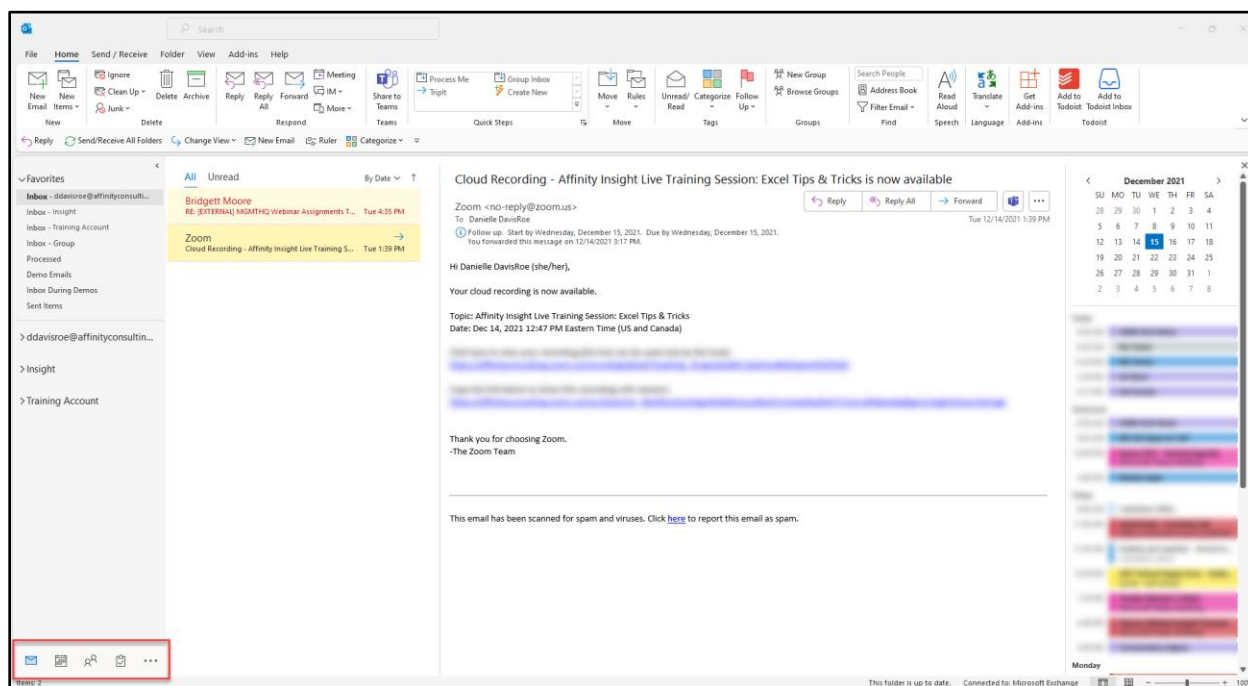


FIGURE 2-1

Outlook 2019/21/365

To see all of the Outlook folders, click on the **More apps button** and choose **Folders**.

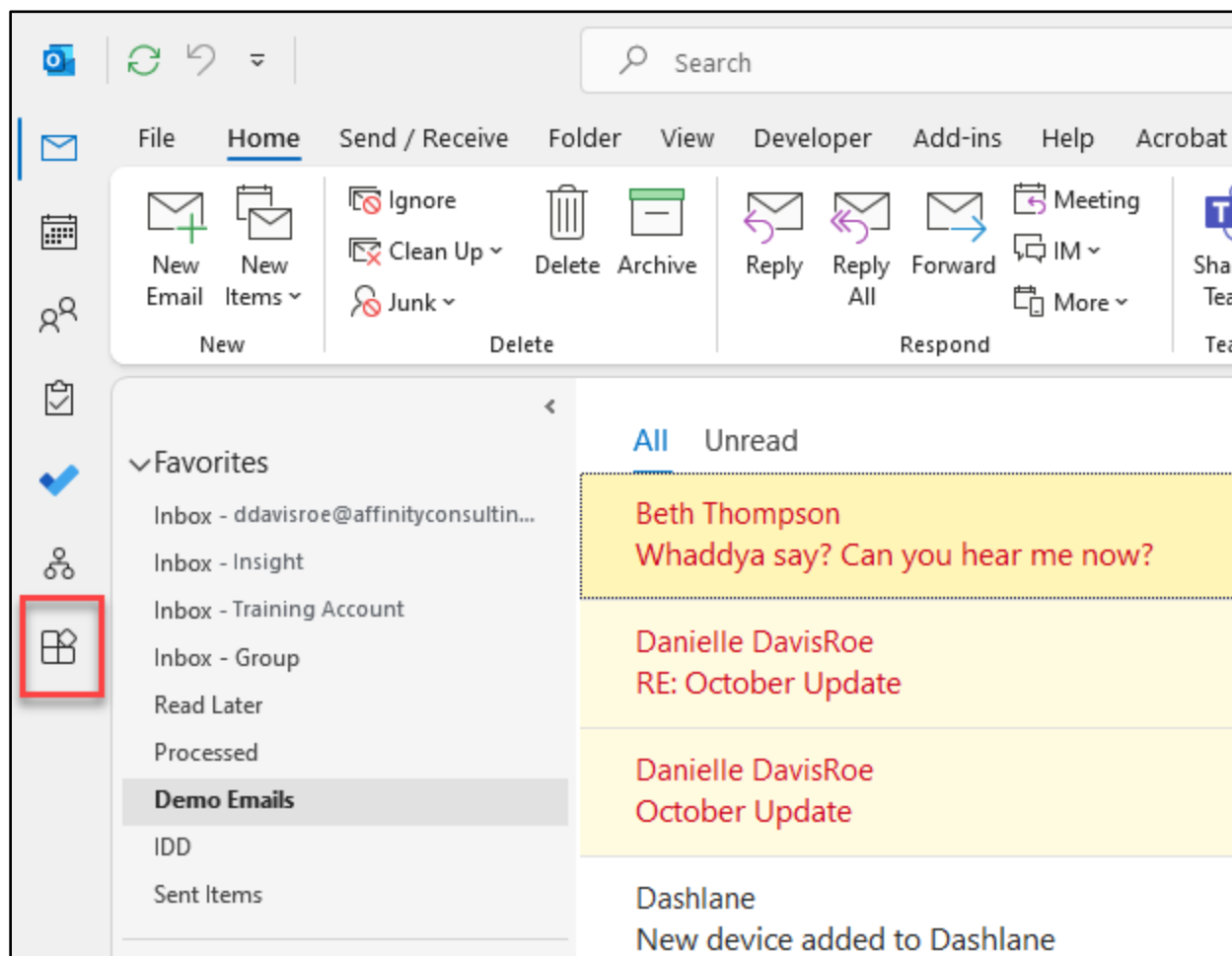


FIGURE 2-2

Opening Folders in New Windows

To open a folder in a new window, right-click on the navigation button, and select **Open in New Window**.

Quick Access Toolbar

Use and modify the Quick Access Toolbar ("QAT") to store your most frequently used commands. By default, the QAT is configured with a few commands.

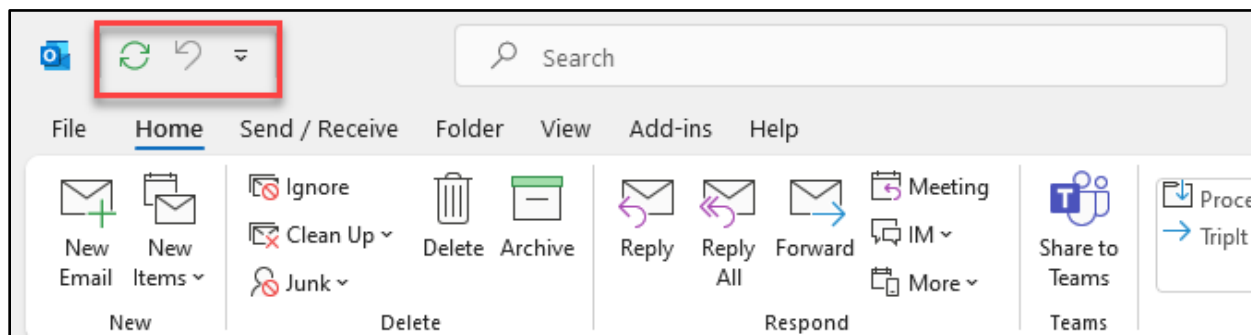


FIGURE 2-3

In 2019/21/365, the QAT is hidden by default. To show the QAT, right click on the ribbon and click on **Show Quick Access Toolbar**.

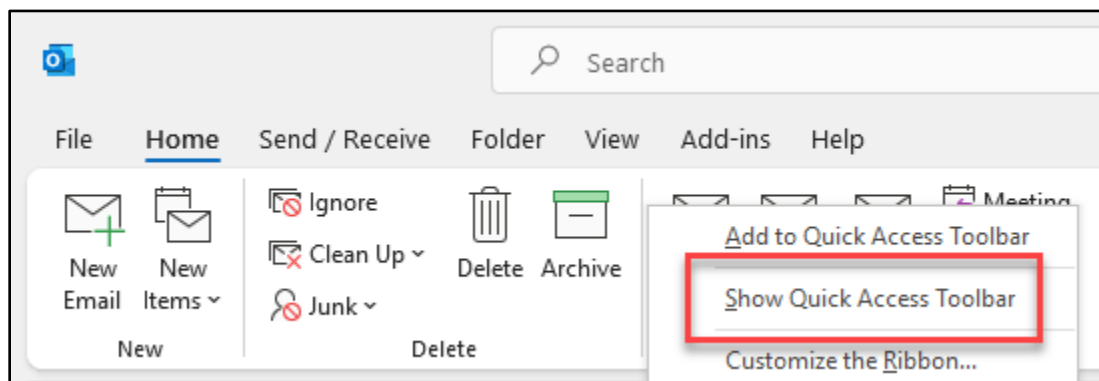


FIGURE 2-4

See page 18 for instructions on how to customize the QAT.

Tabs

The tabs are located at the top of the screen, immediately below the title bar. They change the ribbon.

Ribbon

The ribbons contain (almost) all of the commands that are used to work in Outlook. Each ribbon contains a group of related commands and functions. While many of the tabs are the same between email, calendar, and contacts, the ribbons are different.

Email Reading Pane

The Reading Pane shows emails in the main Outlook window without having to double-click on the email to open it.

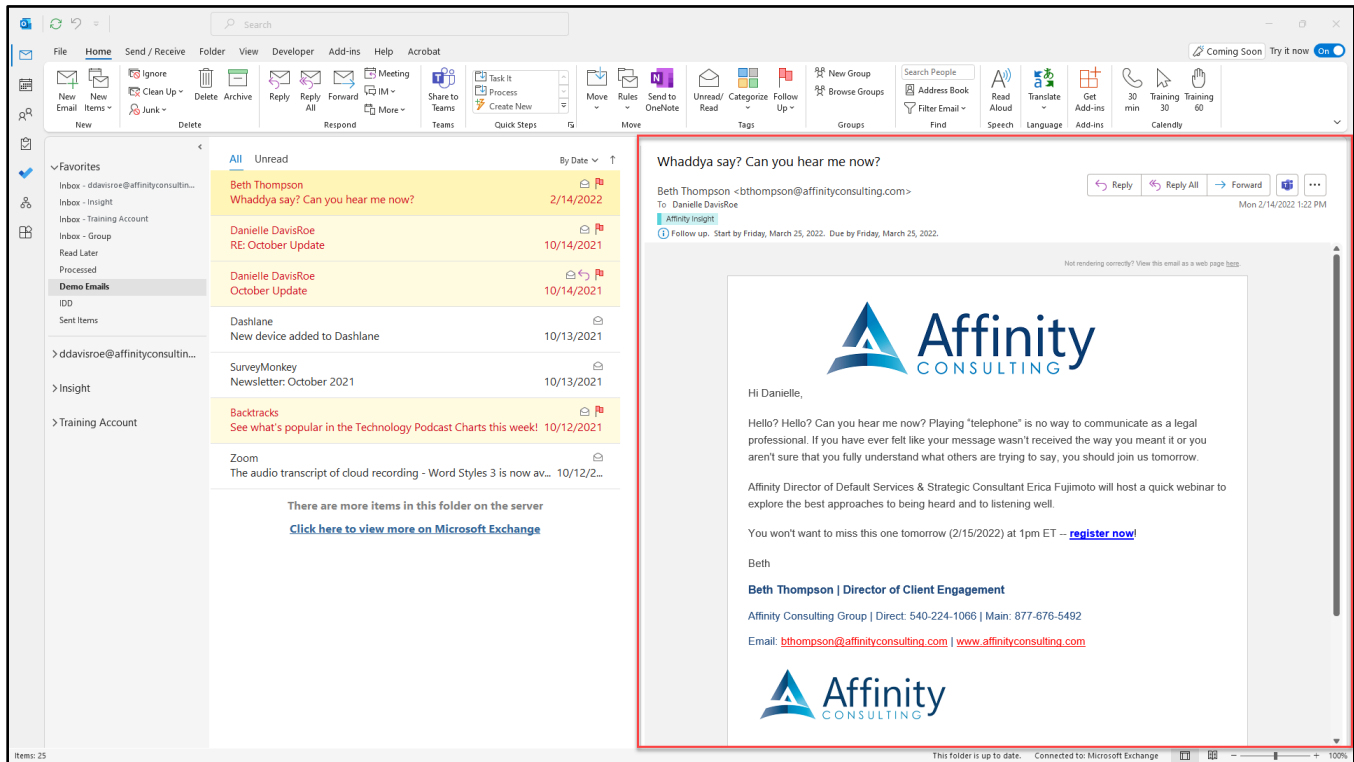


FIGURE 2-5

Convert One Type of Item to Another

For example, you can create a contact from an email by dragging the email onto the **Contacts** button. You can drag emails or tasks to the **Calendar** button to make appointments. If you drag emails onto buttons, it will leave the email where it was.

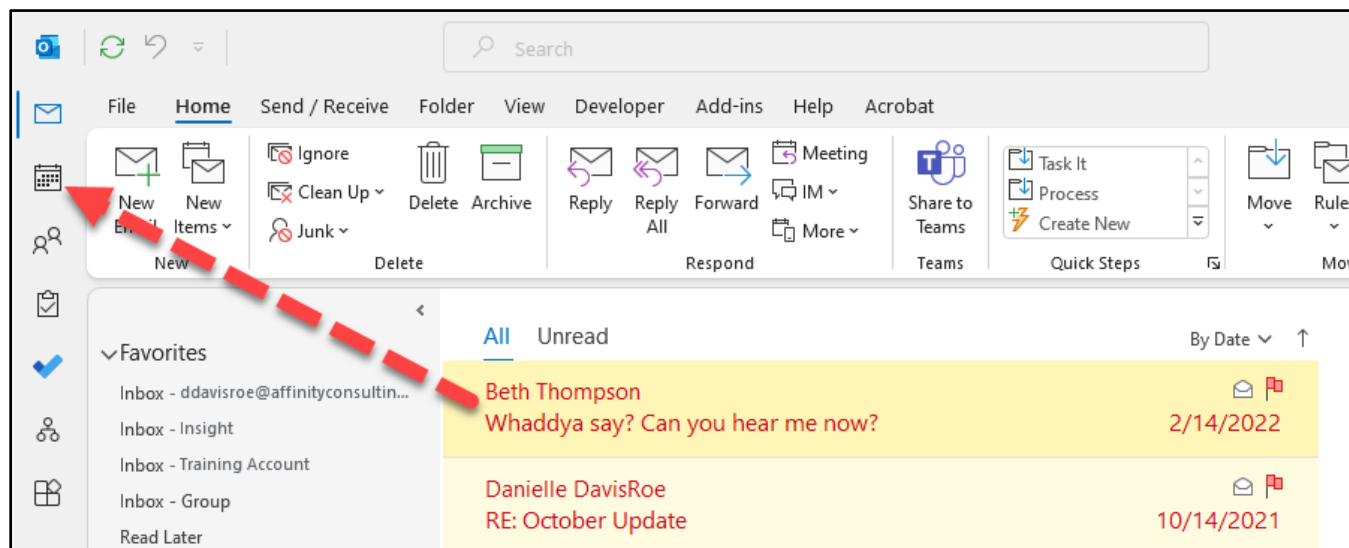


FIGURE 2-6

CHAPTER 3

DEFAULT SETTING CHANGES

Can't find it? Something missing? Instructions not clear? Email manuals@affinityconsulting.com.

General Settings

This setting is found under the **File menu** → **Options** → **General**. Uncheck **Show Mini Toolbar** if you'd rather not the mini toolbar that pops up when you select text.

Mail Settings

All of these settings are found under the **File menu** → **Options** → **Mail**.

Format

Under **Compose messages in this format**, select HTML.

Check Spelling Automatically

If you want Outlook to spellcheck your email before sending, under **Compose Messages**, check **Always check spelling...**

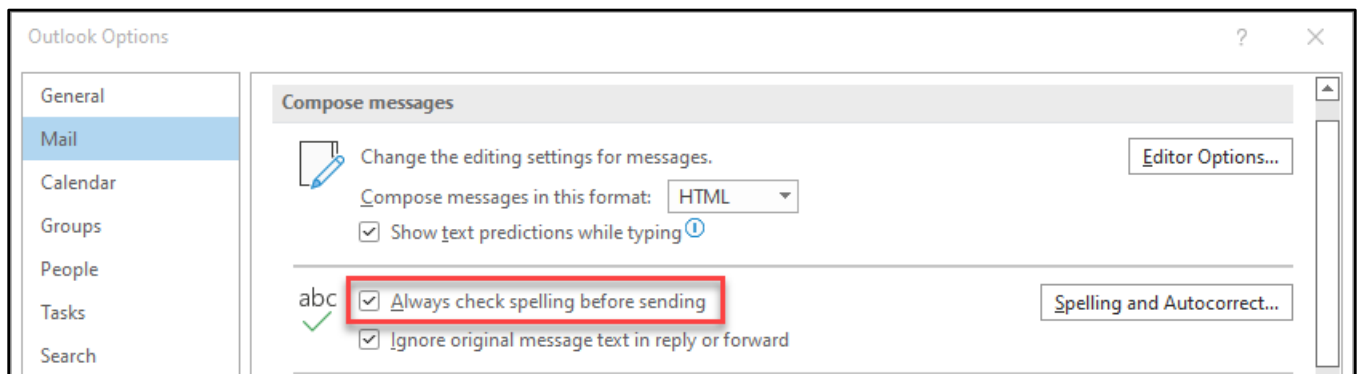


FIGURE 3-1

Click on the **Spelling and Autocorrect... button** and uncheck **Ignore Words in UPPERCASE**.

Set Up Your Signature

Under **Compose Messages**, click on the **Signatures... button** to setup your email signatures. It is recommended that you have an email signature automatically attached to every new message and every reply/forward. However, the reply/forward signature doesn't need to be as detailed as the one you use for new messages.

To create a new email signature:

1. Click on the **New button** to create a new email signature.
2. **Type a name for the signature** and click **OK**.
3. In the empty text box, create your email signature.

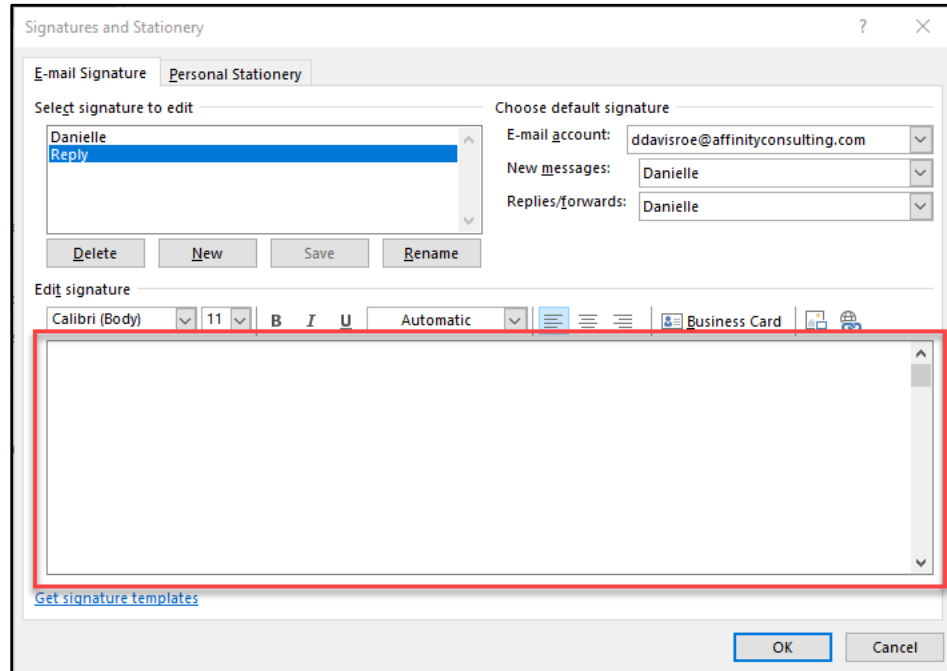


FIGURE 3-2

4. Click on the **Save button**.

To set your default email signatures for new messages and replies/forwards, select the desired signature under **Choose default signature**.

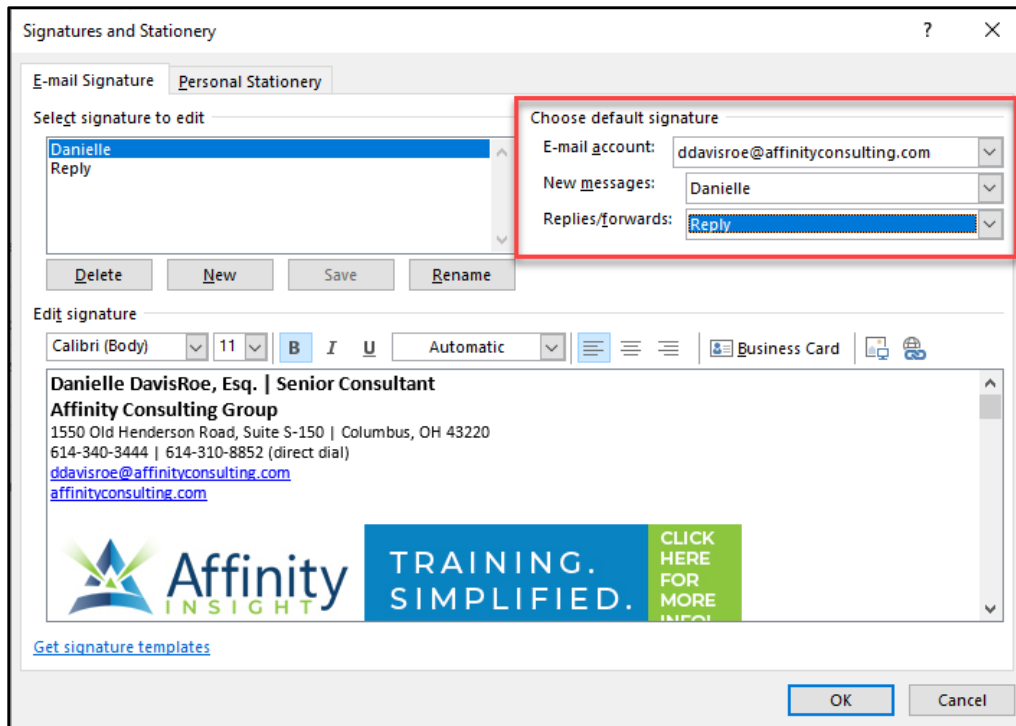


FIGURE 3-3

Default Fonts

Under **Compose Messages**, click on the **Stationery and Fonts...** button. New messages, replies/forwards, and plain text messages all have separate font settings. Click on the **Font...** button to change the default font for each message type.

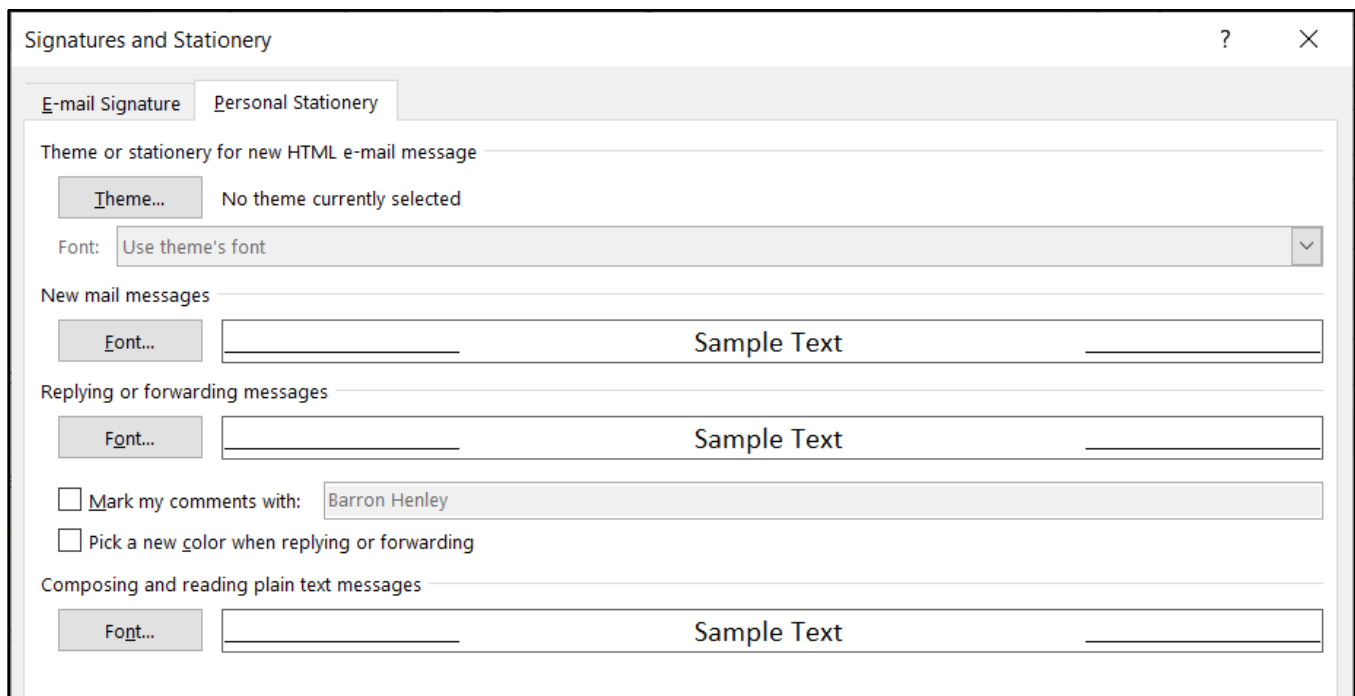


FIGURE 3-4

Stop Marking Emails as Read When Viewed in Reading Pane

By default, Outlook marks emails as read when they are viewed in the Reading Pane. To retain the unread status until emails are double-clicked to open, under **Outlook panes**, click on the **Reading Pane button**. Uncheck **Mark items as read when viewed in the Reading Pane** and **Mark item as read when selection changes**. Then click **OK**.

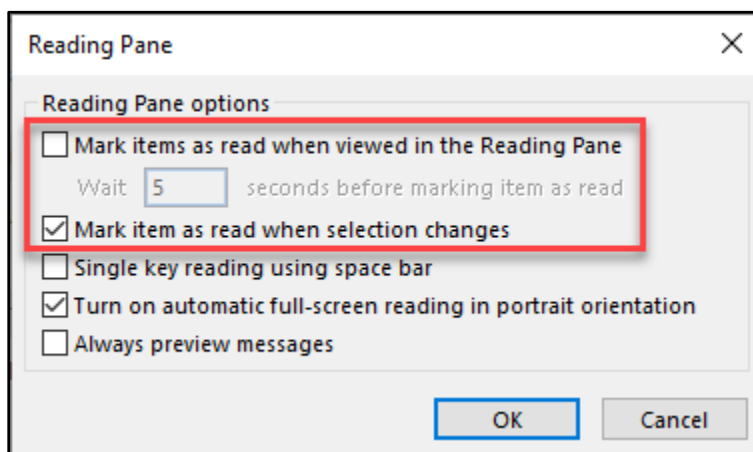


FIGURE 3-5

Turn Off Message Notifications

As described above, you can turn off email notifications and we strongly recommend that you at least try this. Under **Message Arrival**, uncheck all of the boxes.

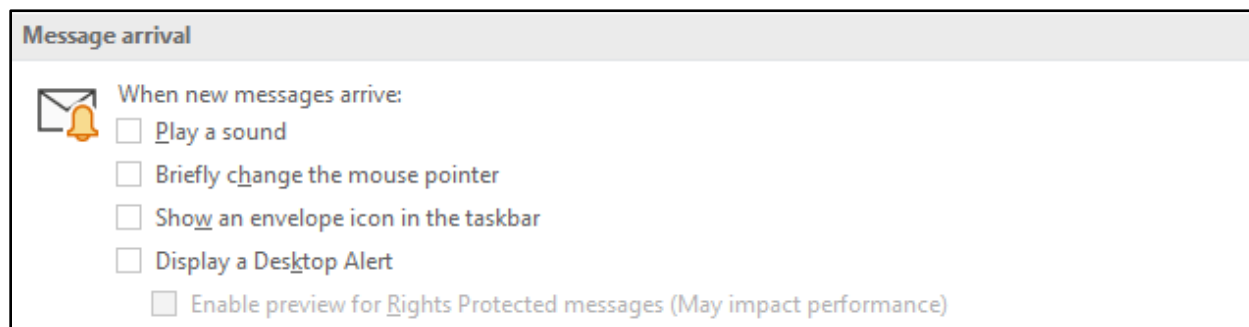


FIGURE 3-6

Automatically Open Replies and Forwards in a New Window

Depending upon what version of Outlook you have, when you click on the Reply or Forward button in the navigation pane, it may open the reply/forward in the reading pane rather than as a separate window. While you can click on pop-out to move the reply/forward out of the reading pane and into a new window, you can change your settings to do this automatically. Under **Replies and Forwards**, check the box to **Open replies and forwards in a new window**.

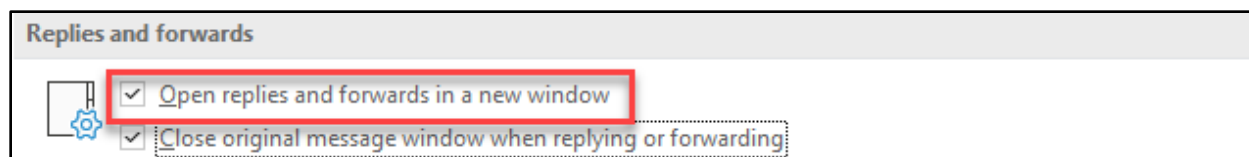


FIGURE 3-7

Close Original Messages When Replying or Forwarding

When replying to or forwarding an email that was opened in its own window (by double-clicking on the email), Outlook can automatically close the original email. Under **Replies and forwards**, check the box to **Close original message window when replying or forwarding**.

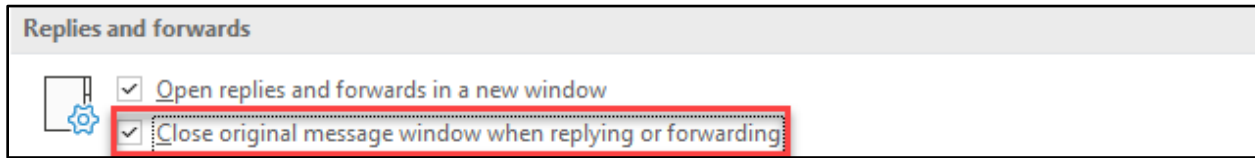


FIGURE 3-8

Mark Messages as Read When Deleted

If you dislike having a bunch of email in your deleted items identified as unread, check the box below under **Other**.

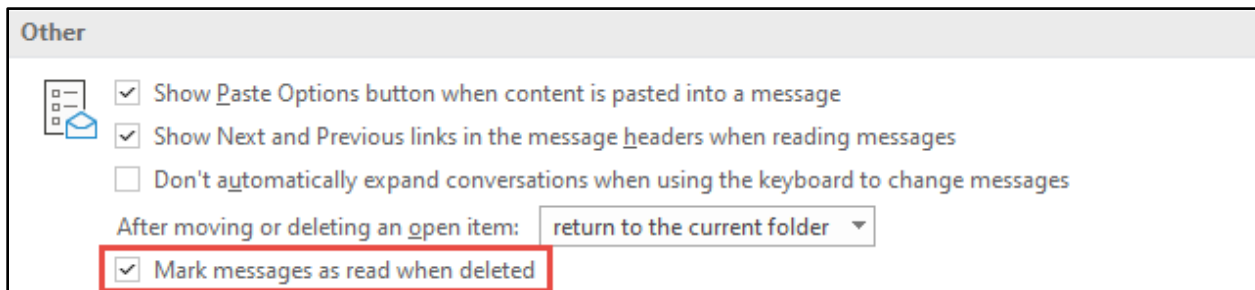


FIGURE 3-9

Calendar Settings

All of these settings are found under the **File menu ➤ Options ➤ Calendar**.

Change Work Start and End Hours

If you work different hours or days than Outlook's defaults, you can change them under **Work time**.

Default Duration for Appointments and Meetings

When adding a new appointment on your calendar, Outlook defaults to a 30-minute duration. You can change the default reminder time under **Calendar options**.

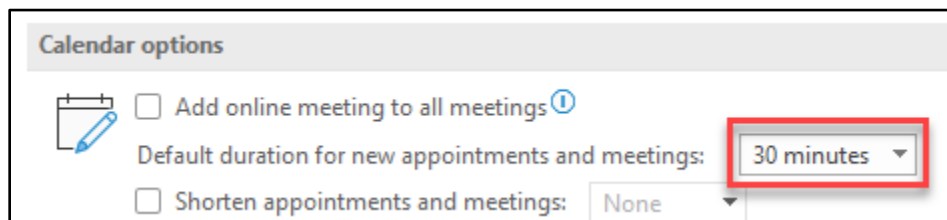
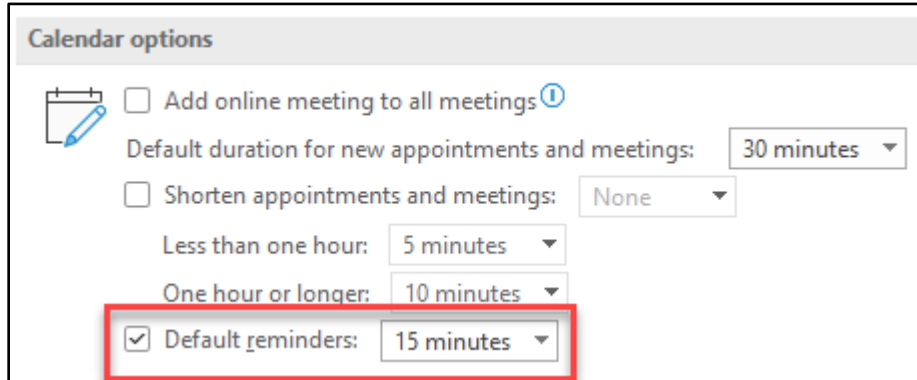


FIGURE 3-10

Default Reminder Timing

Outlook will add a 15-minute reminder to all calendar appointments by default. You can change the default reminder time under **Calendar options**.



Calendar options

☐ Add online meeting to all meetings ⓘ

Default duration for new appointments and meetings: 30 minutes ▼

☐ Shorten appointments and meetings: None ▼

Less than one hour: 5 minutes ▼

One hour or longer: 10 minutes ▼

☒ Default reminders: 15 minutes ▼

FIGURE 3-11

Change Calendar Color

To change the default color of your calendar, select a new color under **Display Options**.



Display options

Default calendar color: [Color Picker] ▼

☐ Use this color on all calendars

FIGURE 3-12

Show Multiple Time Zones in Your Outlook Calendar

Under Time Zones, you can add one or two additional time zones to your calendar (which will display side-by-side).



Time zones

Label: EDT

Time zone: (UTC-05:00) Eastern Time (US & Canada) ⓘ

☒ Show a second time zone

Label: MDT

Time zone: (UTC-07:00) Mountain Time (US & Canada) ▼

☒ Show a third time zone

Label: PDT

Time zone: (UTC-08:00) Pacific Time (US & Canada) ▼

Swap Time Zones

FIGURE 3-13

People Settings

This setting is found under the **File menu** ➔ **Options** ➔ **People**. We recommend using the settings below.

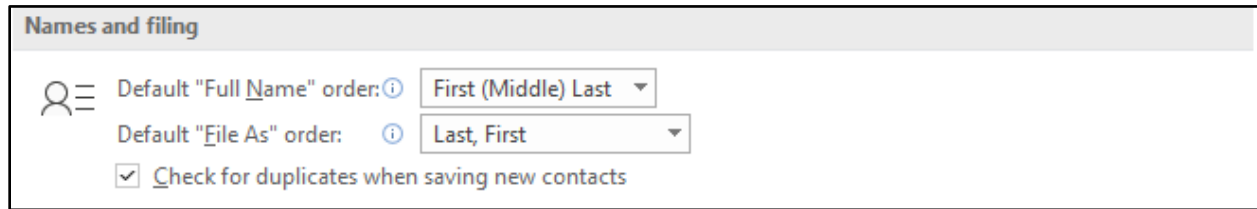


FIGURE 3-14

Advanced Settings

This setting is found under the **File menu** ➔ **Options** ➔ **Advanced**.

Change Your Reminder Sound and Avoid Missed Reminders

If you would prefer another sound as a reminder, you can make the change under **Reminders**. Furthermore, many people have missed reminders in Outlook because they can hide behind other applications. There's now a solution for that. Under **Reminders**, just check **Show reminders on top of other windows**.

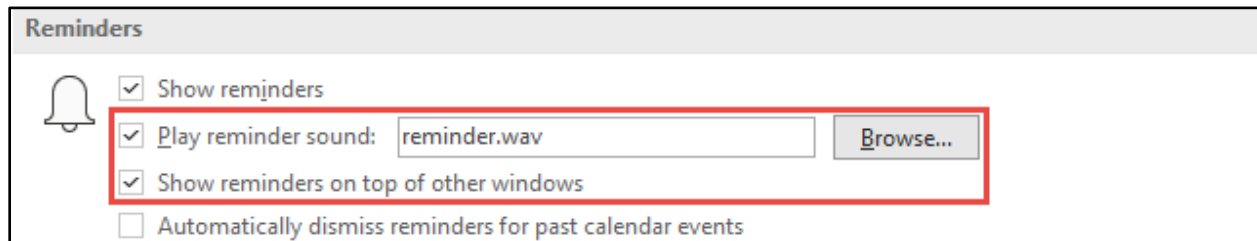



FIGURE 3-15

Changes to the Quick Access Toolbar

You can add commands through the Quick Access Toolbar ("QAT") menu by clicking on the  icon on the right edge of the toolbar, then choosing **More Commands**. The menu contains items for the most common commands.

Select one of the common commands to add it to the toolbar. If your toolbar becomes too long for the top of the screen, right-click the **QAT**, and select **Show Below the Ribbon** to have it appear below the Ribbon. To add other commands or to change the order of the icons on the toolbar, select **More Commands...** to bring up the customize options (you can also get to this window from **File menu** ➔ **Options** ➔ **Quick Access Toolbar**).

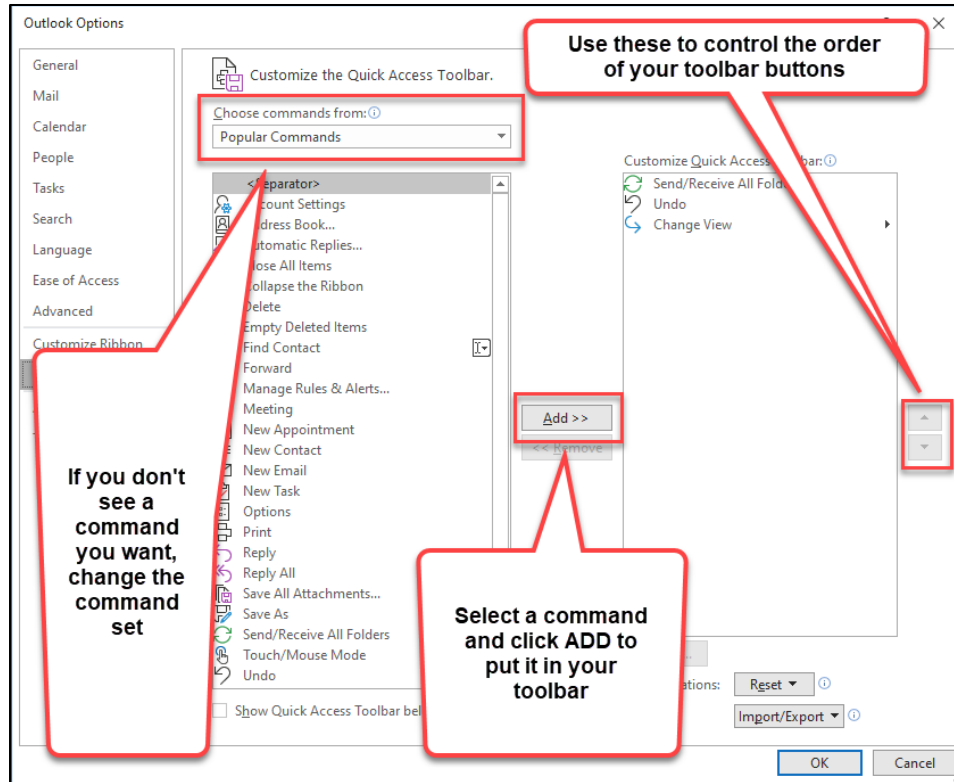


FIGURE 3-16

CHAPTER 4

EMAIL: VIEWING AND READING EMAIL

Can't find it? Something missing? Instructions not clear? Email manuals@affinityconsulting.com.

Reading Emails

Double click on an email message, or single click the message with the reading pane open, to read the email.

Emails with Attachments

Switch to viewing an attachment by left clicking on the attachment.



FIGURE 4-1

Switch back to the message by clicking on **Back to message**.



FIGURE 4-2

Conversations

To read emails as conversations, in the **View tab**, check the **Show as Conversations box**. This groups email messages in a chain of emails and displays them as an expanding list.

Ignore Button

****Warning** use this sparingly or not at all. Clicking this will automatically move all future emails in a thread to the deleted items.**

See More Email at Once

If you tend to have a lot of emails in your inbox, you may want to see as many emails on the screen as possible. If an email slides off the bottom of the screen, it is easy to forget about it. The changes below will maximize the number of emails you can see at once.

Reading Pane

If the Reading Pane is at the bottom of the screen, it takes up space that could otherwise show more email. To turn it off or move it, click on the **View ribbon ➔ Reading Pane button ➔ Off or Right**.

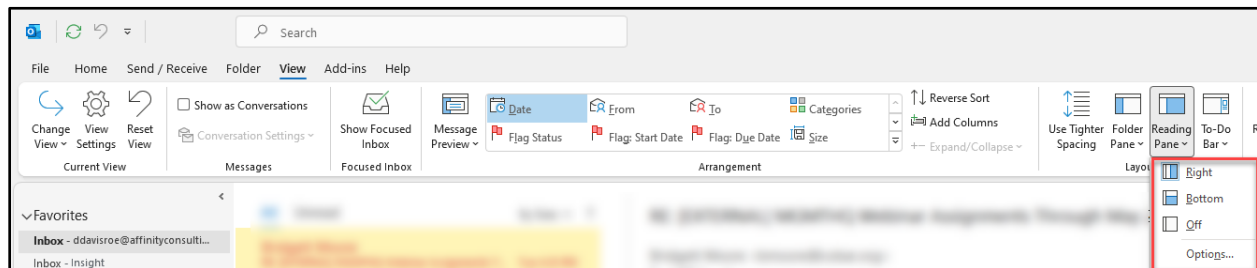


FIGURE 4-3

Date Grouping

By default, Outlook groups your email by date received. The date bars that run across your screen take up space that could be used to show more email.

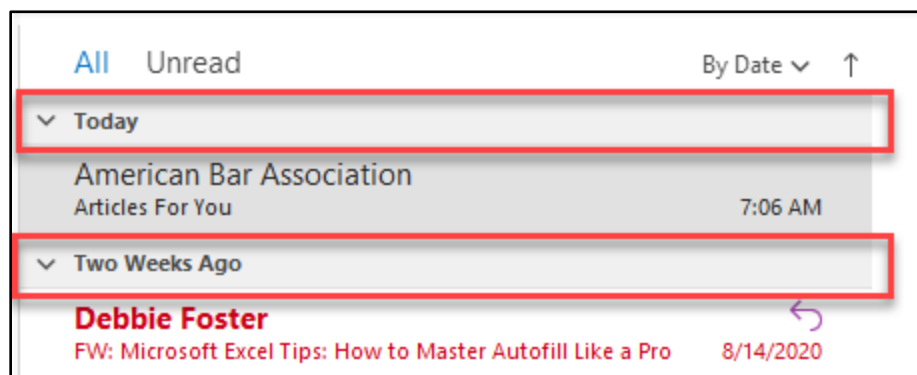


FIGURE 4-4

To turn it off the date bars, click on the **View ribbon ➔ View Settings button ➔ Group By... button ➔ uncheck Automatically group** according to arrangement.

Message Preview

The message preview shows the first 1-3 lines of each email under the subject.

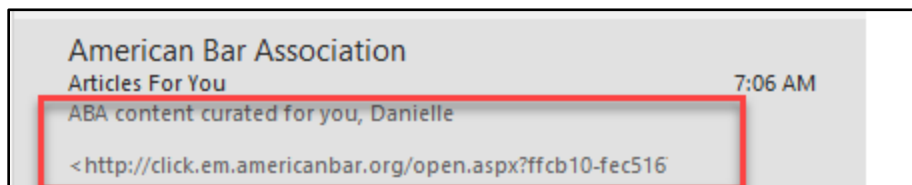


FIGURE 4-5

Turning off the message preview allows you to see significantly more email on one screen. To turn it off, click on the **View ribbon** ➔ **Message Preview button** ➔ **Off**.

Tighter Spacing (2021/19/365)

Using tighter spacing tightens up the spacing between emails, allowing you to see more emails at once. **View ribbon** ➔ **Layout group** ➔ **Use Tighter Spacing**.

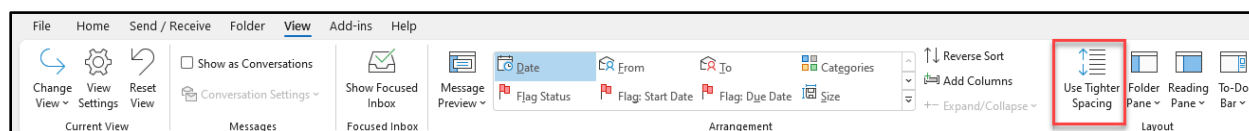


FIGURE 4-6

Compact Layout

If your email list is too narrow (either because your Outlook window is narrow or your Reading Pane is fairly wide), Outlook switches to the compact layout by default. The compact layout shows the sender in a larger font on the first line and the subject on the second line in a smaller font.

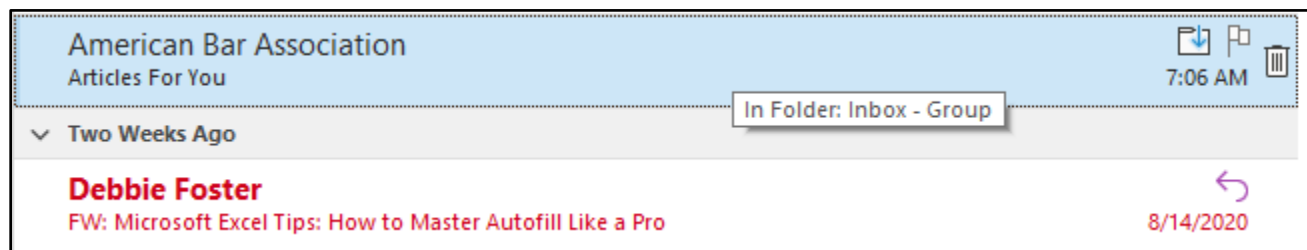


FIGURE 4-7

Turning off compact layout maximizing the number of emails you can see on one screen by moving the sender's name and the subject to the same line. To turn off compact layout, click on the **View Ribbon** ➔ **View Settings button** ➔ **Other Settings button** ➔ Uncheck **Use compact layout...** ➔ tick the radio button for **Always use single-line layout** ➔ **OK button**.

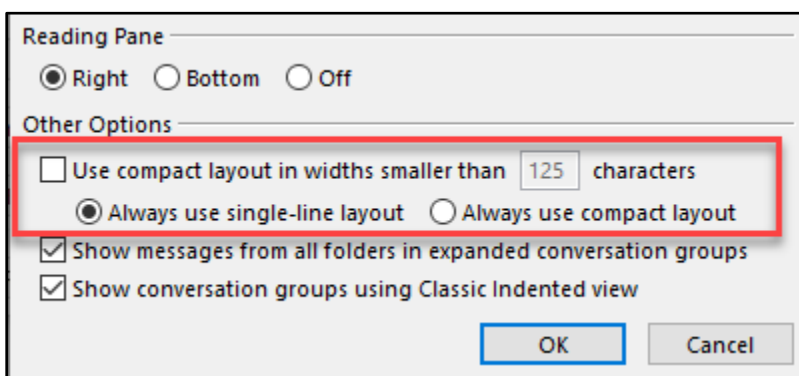


FIGURE 4-8

Compact Your Navigation Options (2016)

Outlook 2016 can use words at the bottom left corner of the email screen for allowing users to switch between functions in Outlook.

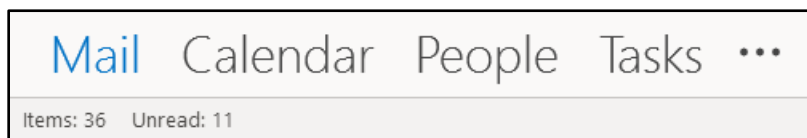


FIGURE 4-9

These words take up space that could be used to show more email. If you'd like to change the words to smaller icons, click on the **...** button adjacent to the big words ➔ **Navigation options** ➔ **check Compact Navigation** ➔ **OK button**. This will convert the big words to little buttons as follows:



FIGURE 4-10

Unpin the Ribbon (2013/16)

Unpinning the Ribbon hides it when you are using it, allowing you to see more email at once. To unpin the ribbon, click on the **^ icon** in the bottom right-hand corner of the ribbon.

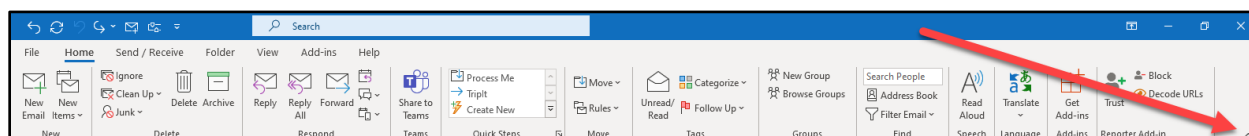


FIGURE 4-11

To open the ribbon back up, click on a tab:



FIGURE 4-12

To pin the Ribbon open again (so that it stays open), click on the **push pin icon**.

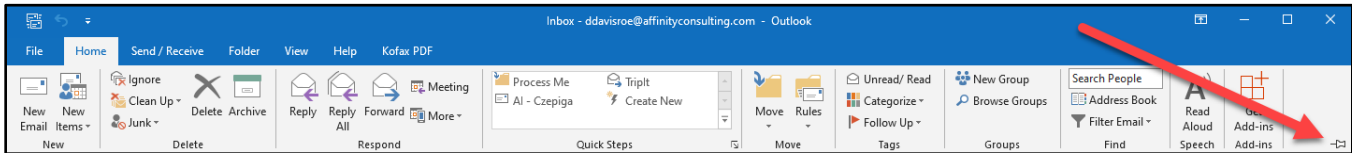


FIGURE 4-13

Simplified Ribbon (2019/21/365)

Click on the arrow in the bottom right-hand corner of the ribbon to switch between the classic and simplified ribbons.

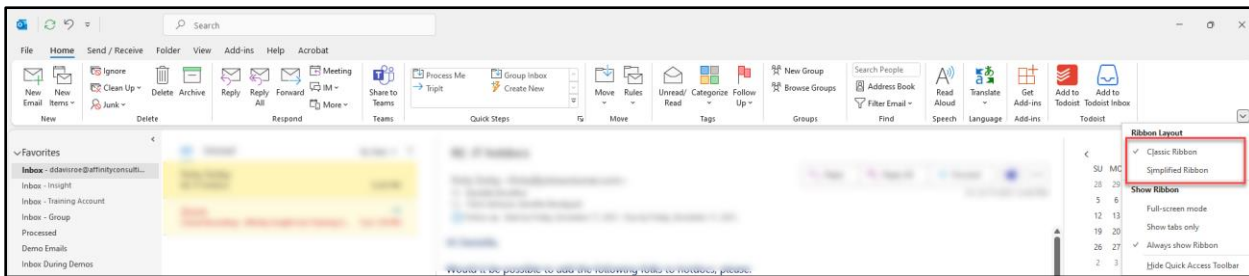


FIGURE 4-14

Columns

Columns are useful for seeing information about your email at a glance (such as the sender's name, the subject, and whether there is an attachment). Email can be quickly sorted based on the columns and you can customize the columns to meet your needs.

Add or Remove Columns

To add or remove columns, click on the **View Ribbon ➔ View Settings Button ➔ Columns... button**.

To remove columns:

1. Click on the column to be removed on the right side.
2. Click on the **< - Remove button**.

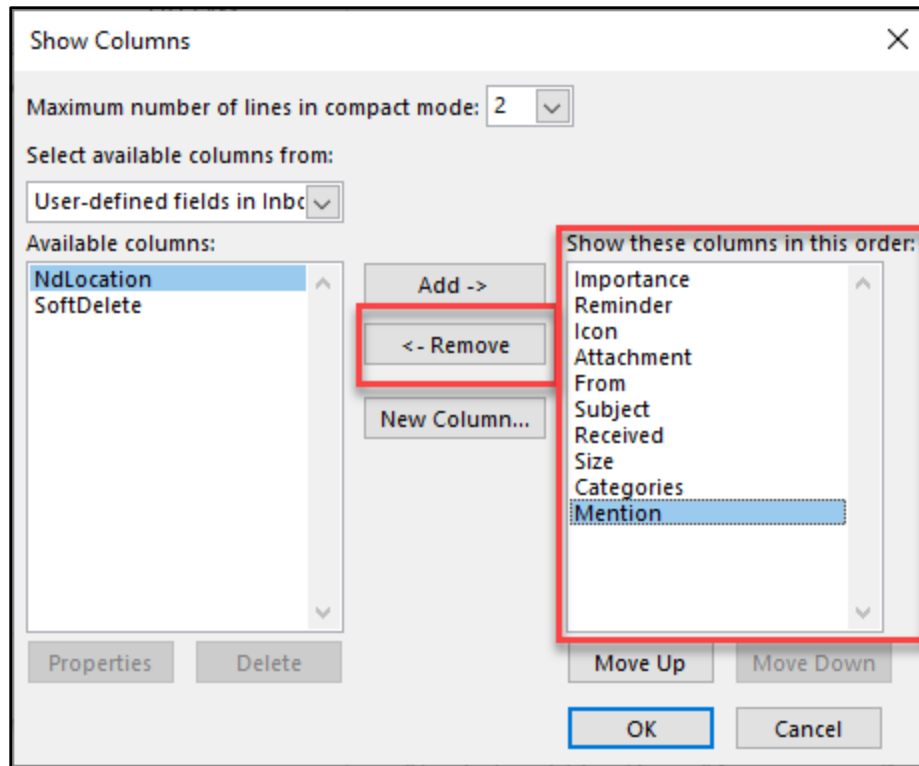


FIGURE 4-15

To add columns:

1. Click on the column to be removed on the left side.
2. Click on the **Add -> button**.

Reorder Columns

Reorder columns by click on the **View Ribbon ➔ View Settings Button ➔ Columns... button**. Use the Move Up and Move Down buttons on the left side.

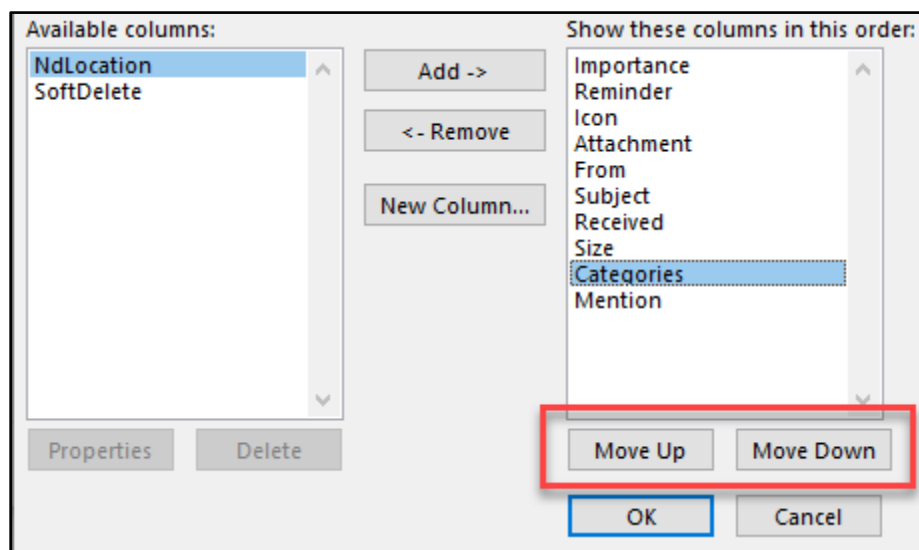


FIGURE 4-16

Sorting Email

Sort by Column

If you click on a column name, it will sort your email by that criterion. If you click the same column name again, it will sort in reverse order.

Sort by Arrangement

You can also change how email is sorted by clicking the appropriate buttons in the **Arrangement** group on the **View Ribbon**.

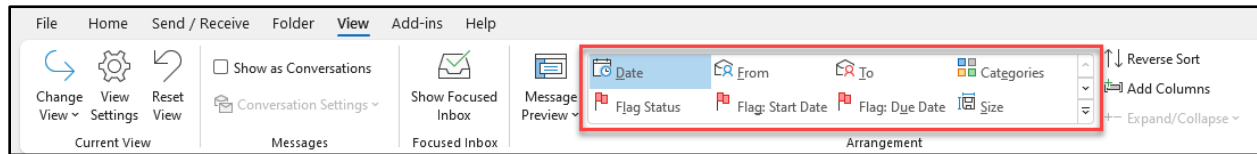


FIGURE 4-17

Filtering Email

All/Unread (2019/21/365)

Click on **Unread** at the top of your list of emails to quickly filter your inbox for unread emails only. Click on **All** to show all emails - whether read or unread.

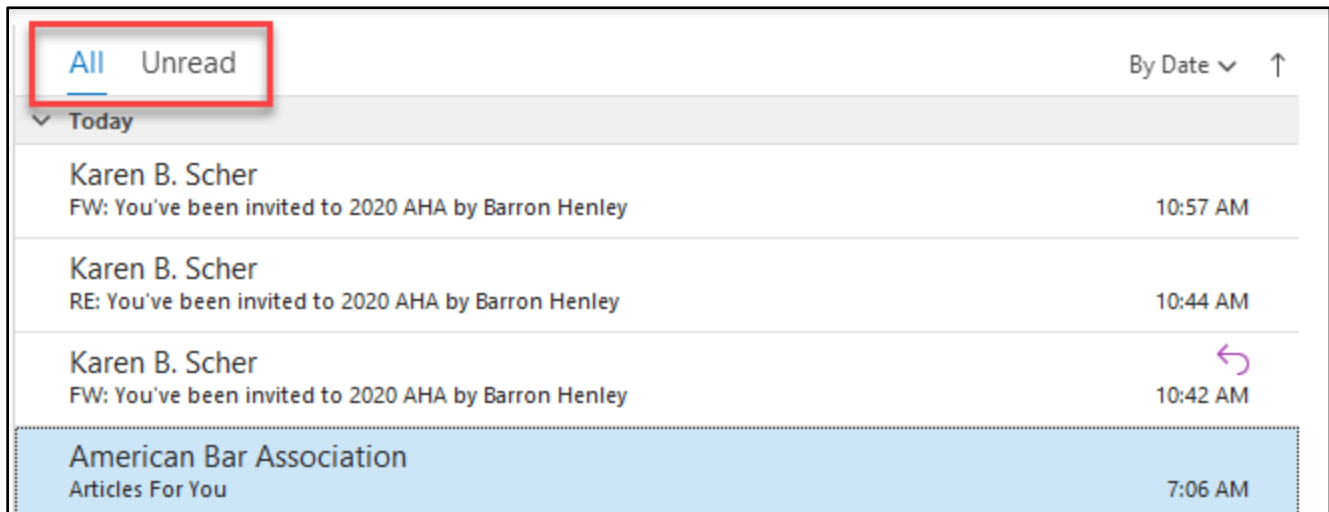


FIGURE 4-18

The All/Unread filters are unavailable if you are using the focused inbox. To turn off the focused inbox, open your inbox by clicking on the inbox in your folder pane, then go to the **View ribbon** and toggle off **Show Focused Inbox**. The button to toggle the focused inbox on and off only appears when you are in your inbox - it does not appear if any other folder is open.

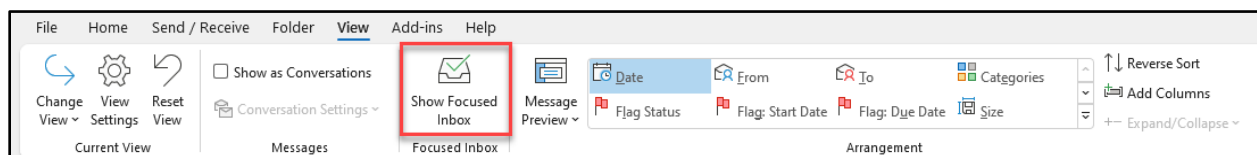


FIGURE 4-19

Focused/Other (2019/21/365)

The focused inbox filters email into two tabs: Focused and Other. Microsoft uses rules to determine where to place emails. To turn on the focused inbox, click on the inbox in your folder pane, then go to the **View ribbon** and toggle on **Show Focused Inbox**. The button to toggle the focused inbox on and off only appears when you are in your inbox - it does not appear if any other folder is open.

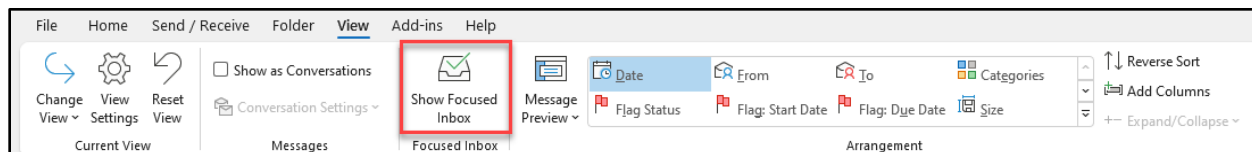


FIGURE 4-20

Click on **Focused** and **Other** at the top of your inbox to flip between the two inboxes.

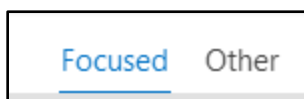


FIGURE 4-21

You can move emails between the focused and other inboxes by right-clicking and selecting **Move to Focused** or **Move to Other**.

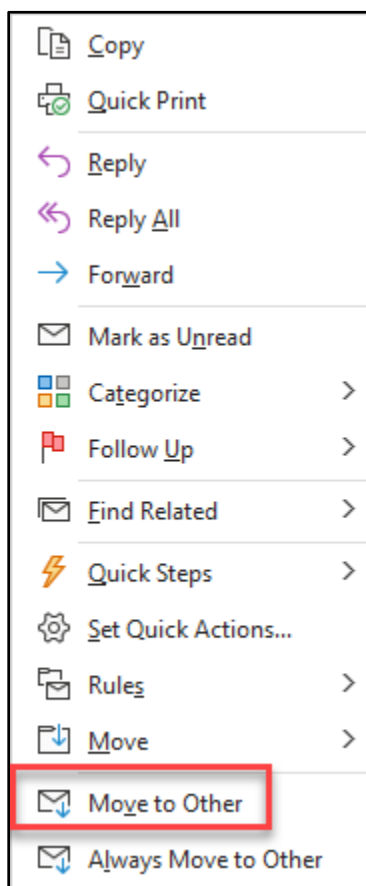


FIGURE 4-22

You can change the rules to always send emails from a particular sender to either inbox. Right-click on an email from that sender and select **Always Move to Focused** or **Always Move to Other**.

Conditional Formatting

Conditional formatting allows you to change the format of emails based upon certain conditions (for example, if the email is from a certain person or group of people, you could have those emails automatically turn red and bold the second they hit your inbox). The conditional formatting settings are found by clicking the **View Ribbon** ➔ **View Settings button** ➔ **Conditional Formatting button**.

Unread emails are blue and bold by default due to conditional formatting. To change how unread emails appear:

1. **View Ribbon** ➔ **View Settings button** ➔ **Conditional Formatting button**.
2. Select **Unread messages**.
3. Click on the **Font...** button.
4. Select the desired font, styles, size, and effects.
5. Click **OK**.

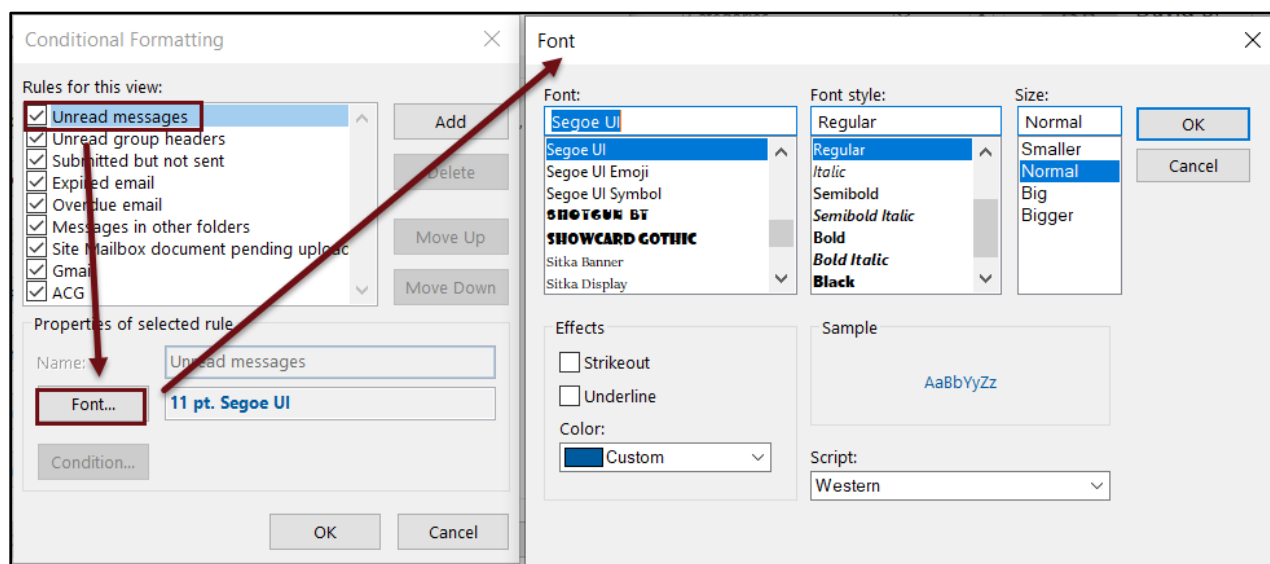


FIGURE 4-23

You can also create your own conditions, such as emails from a particular sender. Conditional formatting can be used to draw attention to emails from important senders.

1. **View Ribbon** ➔ **View Settings button** ➔ **Conditional Formatting button**.
2. Click on the **Add button**.
3. Name the condition.
4. Click on the **Font...** button.
5. Select the desired font, styles, size, and effects.
6. Click **OK**.
7. Click on the **Condition...** button.

8. On the **Messages** tab, enter the person's email address in the **From** box.

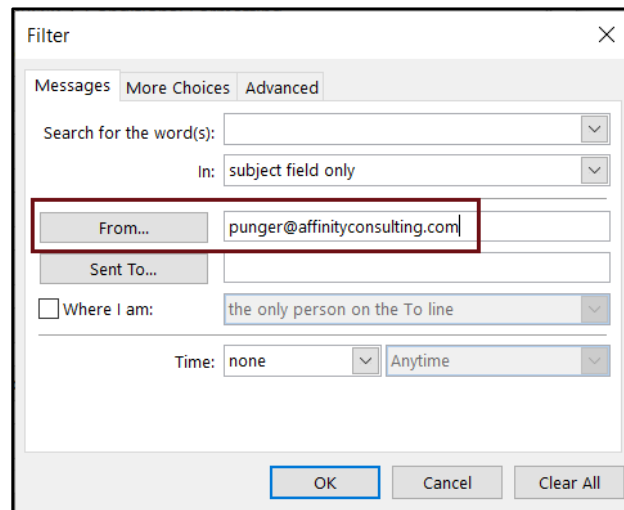


FIGURE 4-24

Folders

Email folders allow you keep your email organized. Legal professionals often create folders for clients or matters to keep related emails together.

Create Folders

To create a new subfolder under your Inbox:

1. Right-click on your Inbox and select **New Folder**.

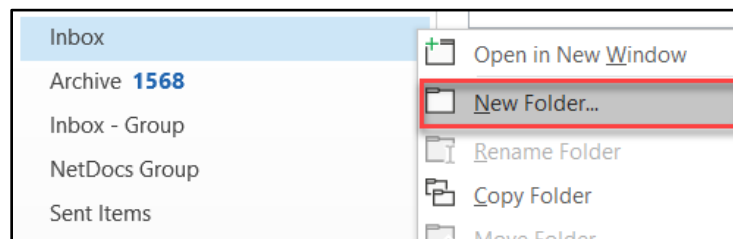


FIGURE 4-25

2. Give it a name.

To create a folder nested under another folder, right-click the name of the parent folder and select **New Folder**.

Reorder Folders

To reorder the folders, drag and drop them in the folders pane.

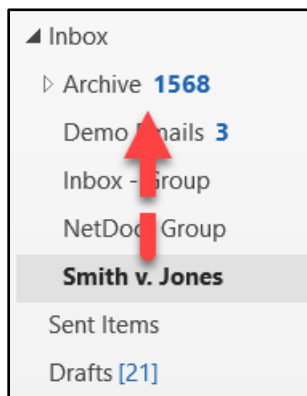


FIGURE 4-26

Managing Multiple Inboxes

You might have multiple inboxes if you have access to someone else's inbox, have access to a shared inbox, or have added additional email accounts (such as a personal email account) to Outlook. Managing multiple inboxes can be a bit tricky but gets a lot easier with favorites.

Favorites appear at the top of your Folder Pane. If you don't see them, enable them under **View ribbon → Layout group → Folder Pane → Favorites**.

Adding each inbox to your favorites will make them easier to access and help you notice when there are unread emails in them. Right-click on each inbox and select **Add to Favorites**.

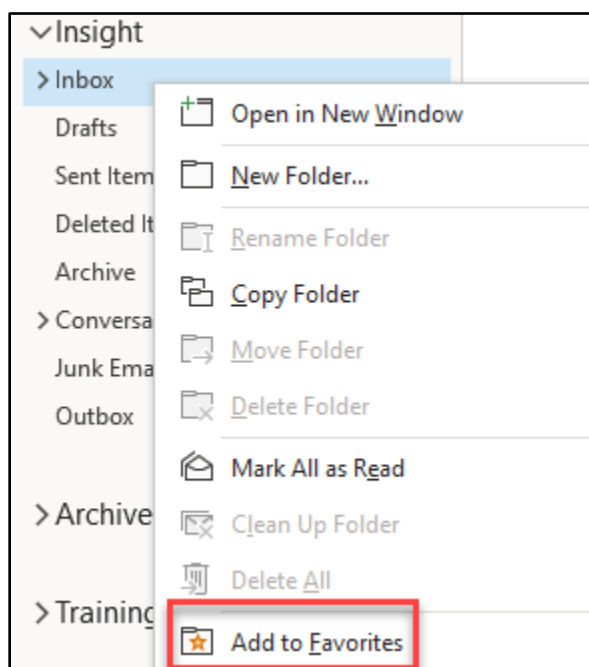


FIGURE 4-27

You can add any other folders that you frequently access to your favorites as well for easy access.

Right-Click Emails for All Possible Options

Right-click on an email to see a full range of options.

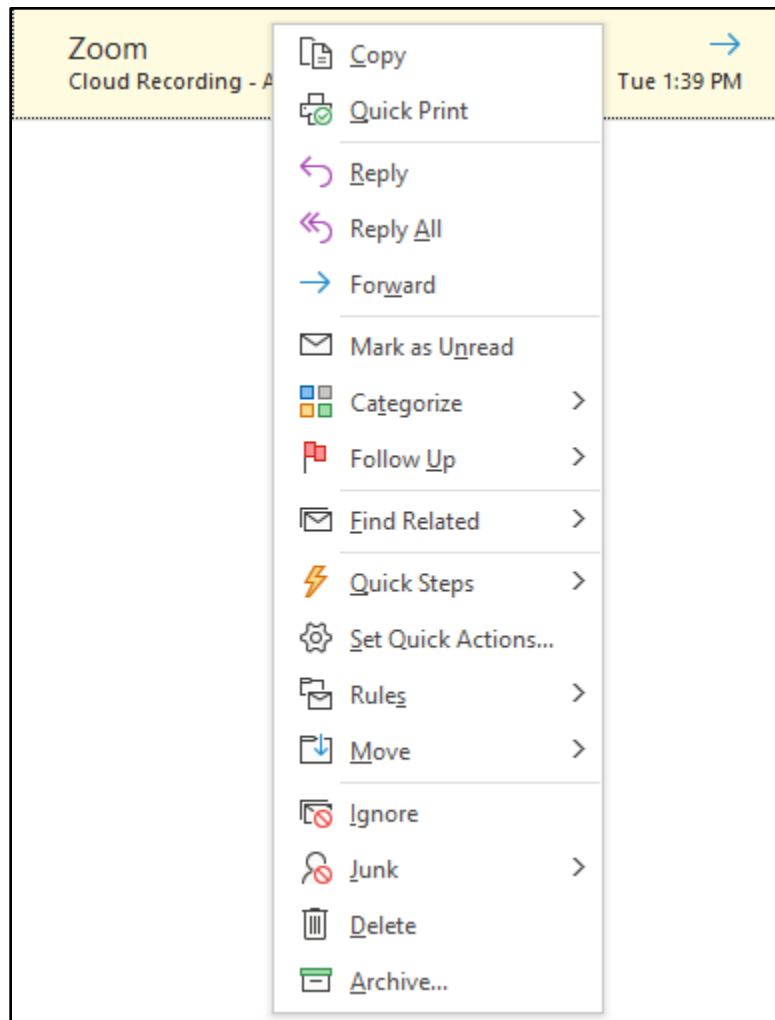


FIGURE 4-28

Add-In: Translate (2019/21/365)

Outlook 2019/21/365 can automatically translate emails.

To use Translate, on the **Home ribbon**, click on **Translate**.



FIGURE 4-29

CHAPTER 5

EMAIL: SENDING EMAIL

Can't find it? Something missing? Instructions not clear? Email manuals@affinityconsulting.com.

Types of Emails

New Messages

To start a new email message, on the **Home ribbon** ➔ **New group** ➔ **New Email button** (KS: Ctrl + N).

A blank email will appear with your default signature (if one is set up). To setup your default signature, see page 12.

Replies

There are two options when replying: Reply and Reply All. When replying to an email sent to you (regardless of whether you were included on the to, cc, or bcc line), Outlook will send the reply to only the sender of the email you are replying to. When replying all to an email sent to you, Outlook will send the reply to the sender and everyone who receive the email you are replying to (excluding anyone who was emailed using bcc).

If you reply to an email you sent someone else, the reply will go to you. However, if you use reply all, the email will go to everyone on the original email and Outlook will not copy you on your reply.

If there was an attachment on the email you are replying to, Outlook will not include the attachment on the reply. If you add new people to the email thread with a reply, they will not have access to the attachments to any prior emails in the thread.

Forwards

Use forwards to send emails and their attachments to people who were not copied on the original email. Forwards automatically include any attachments from the email being forwarded.

Recipient Fields

There are three recipient fields you can use when drafting an email: to, cc, and bcc. You can add more than one recipient to each field.

To

Use this for the main recipient(s) of your email - those you expect reply to your email.

Cc

Use cc (carbon copy) for anyone who needs to be kept in the loop, but you aren't expecting to reply to your email.

Bcc

Use bcc (blind carbon copy) to copy anyone on the email without others knowing they were copied on the email. If you don't see the bcc field, click on **Options** ➔ **Show Fields** ➔ **Bcc button**.

Edit The Auto-Complete List

Outlook stores a list of people you've emailed as an Auto-Complete list. When you start typing someone's name in a recipient field, Outlook gives you a list of options to choose from. You can remove people from that list by clicking on the X to the right of their name in the list.



FIGURE 5-1

Changing Your Email Signature

Outlook automatically adds your default email signature default signature (if one is set up) to new emails, replies, and forwards. To setup your default signature, see page 12. You can set up additional email signatures and change email signatures as needed on an email-by-email basis. Right-click on your signature and select the desired signature from the list.



FIGURE 5-2

If you don't have a signature in your email, click on the **Insert ribbon** ➔ **Include group** ➔ **Signature button** to add a signature.

Email: Frequently Used Text

AutoText

AutoText provides an easy way to insert repetitive blocks of text into your emails quickly.

Accessing AutoText

When drafting an email message, AutoText is found at **Insert ribbon** ➔ **Text group** ➔ **Quick Parts button arrow** ➔ **AutoText**. Adding it to your Quick Access Toolbar makes it much faster to access:

1. Click in the body of your email.
2. On the **Insert ribbon**, in the **Text group**, click on **Quick Parts**.
3. Right-click on **AutoText** and select **Add to Quick Access Toolbar**.

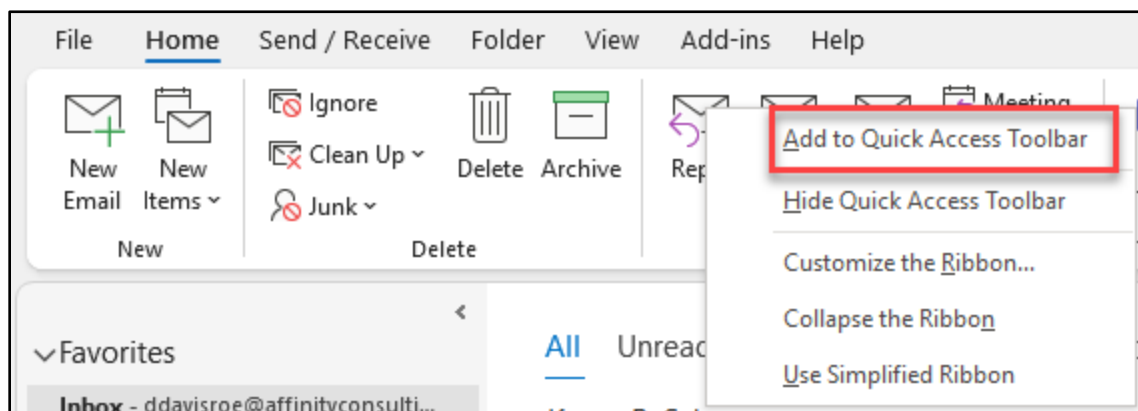


FIGURE 5-3

If you add AutoText to your Quick Access Toolbar, you can create AutoText or use existing AutoText from there.

Create AutoText Entries

1. Type the text you commonly re-use (or find it in an existing email).
2. Select (highlight) the text.
3. Click on the **Insert ribbon** ➔ **Text Group** ➔ **Quick Parts button arrow** ➔ **Auto Text** ➔ **Save Selection to AutoText Gallery**.
4. Give the AutoText entry a name and click **OK**.

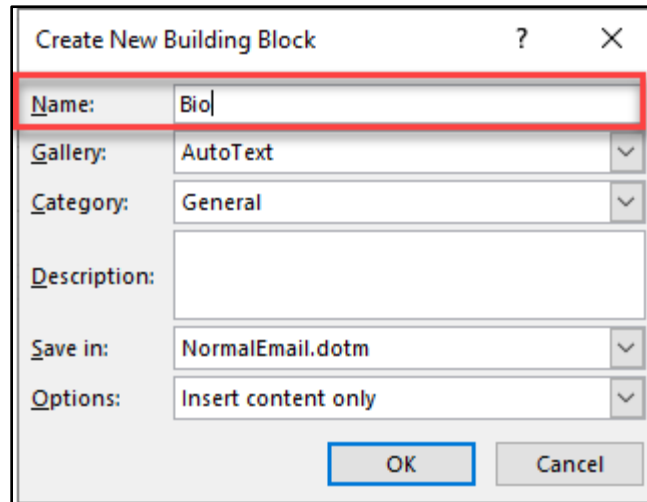


FIGURE 5-4

Use AutoText Entries

There are two ways to do this:

- Click the **Insert ribbon** ➔ **Text Group** ➔ **Quick Parts button arrow** ➔ **Auto Text** ➔ then click the appropriate AutoText entry.
- or
- Type a few letters of the name of the entry ➔ hit **F3** or **Enter**.

Add-In: My Templates (2019/21/365)

Use email templates to avoid having to re-write frequent emails. Some good use-cases include new matter request forms, sending instructions to a client, directions to your office, etc. They aren't super sophisticated, but they are very easy create and helpful!

Create Templates

To create an email template:

1. Create a blank new email.
2. Select **View Templates** from the **Message** ribbon.

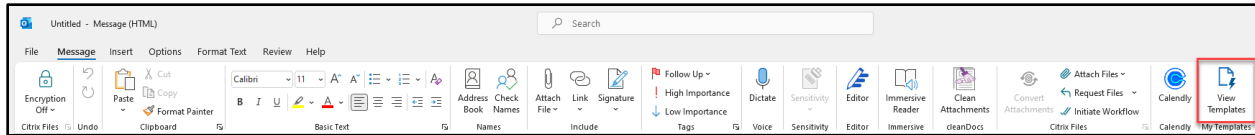


FIGURE 5-5

3. Scroll to the bottom and select **+ Template**.

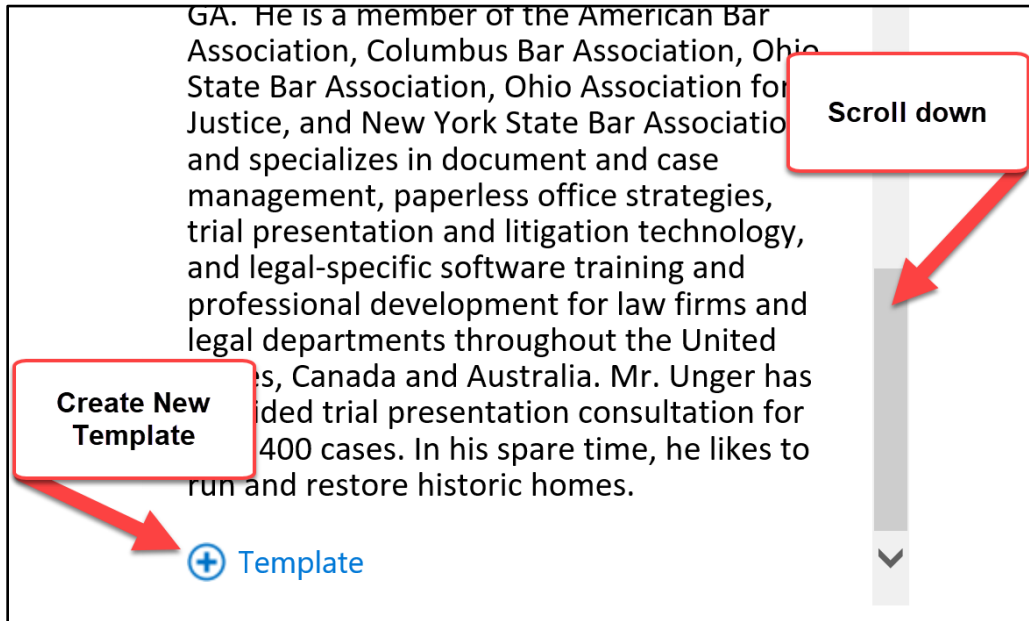


FIGURE 5-6

4. Name the template in the first field and paste your desired text in the second field and hit **Save**.

Use Templates

To use/apply your email template, open a new email, select the **View Templates** button, and simply left click on the desired template.

Email: Out of Office Replies

Outlook can automatically respond to any email messages you receive with an automatic reply. Be warned that if you receive email from a listserv, this may be a problem because every time someone sends a post to the listserv, everyone on the listserv is going to get your out of office message.

Manage Automatic Replies

To manage your automatic reply to anyone who contacts you while you are out of the office, go to **File menu ➔ Info (left side) ➔ Automatic Replies button**.

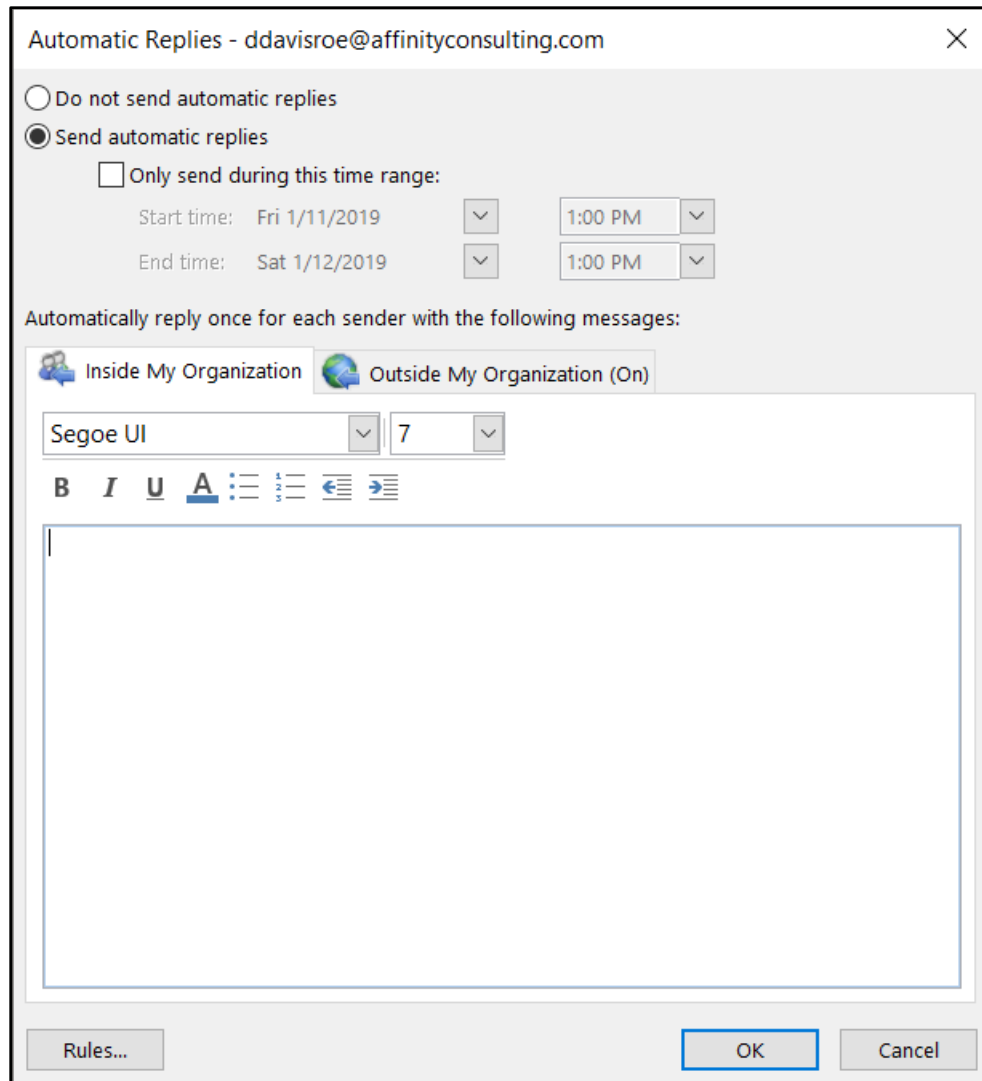


FIGURE 5-7

Turn On Automatic Replies

Click on the radio button next **Send automatic replies** to turn on automatic replies. By default, automatic replies turn on immediately and you must manually turn them off. To set it and forget, check the box to **Only send during this time range**. You can then select the start and end times.

Turn Off Automatic Replies

When automatic replies are turned on, Outlook will show a yellow bar across the top of your email. To turn off the automatic replies, click on the **Turn Off button**.

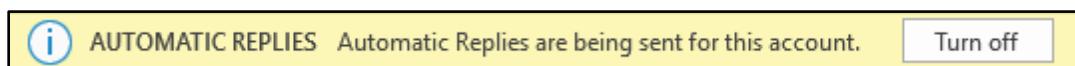


FIGURE 5-8

Attachments

To add an attachment, either click the attachment button or drag and drop the attachment into the email.

Always save the attachment first before editing. Double clicking the attachment and opening it from Outlook creates a **temporary** copy of the file. If you edit the file and just click “save” (as opposed to “save as”), the changes will only be saved to the temporary file. You may or may not be able to recover those changes later.

Polls (2019/21/365)

Polls can be used to quickly collect information from email recipients using simple Microsoft Forms.

Creating Polls

To create a poll in an email message:

1. On the **Insert ribbon**, click on **Poll**.
2. In the **Poll panel**, add your question and options.

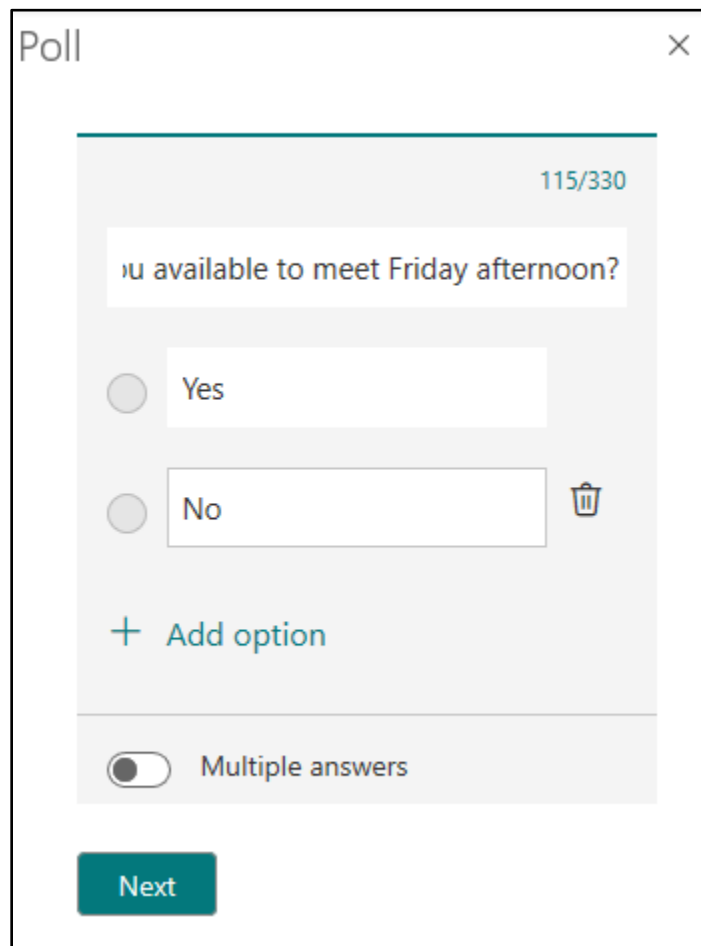
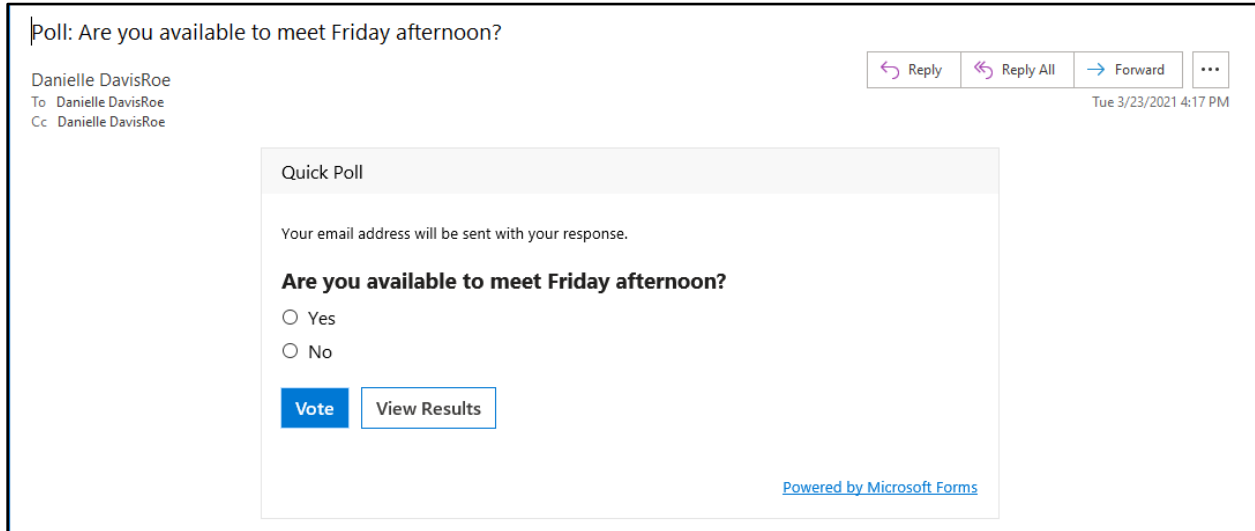


FIGURE 5-9

3. Click **Next**.
4. Click on **Add to email**.

Responding to Polls

The poll recipients can respond to the polls by click on an option and clicking on the **Vote button**.



The screenshot shows an email interface. At the top, the subject line is "Poll: Are you available to meet Friday afternoon?". Below this, the sender is listed as "Danielle DavisRoe" with "To: Danielle DavisRoe" and "Cc: Danielle DavisRoe". On the right side of the email header, there are buttons for "Reply", "Reply All", "Forward", and a three-dot menu. The date and time "Tue 3/23/2021 4:17 PM" are also displayed. The main body of the email contains a "Quick Poll" section. It states "Your email address will be sent with your response." followed by the question "Are you available to meet Friday afternoon?". There are two radio button options: "Yes" and "No". Below the options are two buttons: "Vote" (in blue) and "View Results" (in white with a blue border). At the bottom right of the poll section, it says "Powered by Microsoft Forms".

FIGURE 5-10

Viewing Responses

Open the email with the poll and click on **View results** to see the responses.

CHAPTER 6

EMAIL: RULES

Can't find it? Something missing? Instructions not clear? Email manuals@affinityconsulting.com.

Rules automatically take actions when certain conditions are met. For example, rules can be used to auto-file incoming email into specific folders. Rules are very powerful and can save you a lot of time. However, because they happen automatically, you need to be careful about creating rules that make it so you may miss incoming emails.

Rule Parts

Rules have 3 parts:

- **Condition** (Optional): Use conditions to determine when to the apply the rule. If no conditions are set, the rule is applied to every incoming email. Conditions include things like emails from particular senders, with particular subjects, sent only to you, and with specific words in the email. If no conditions are set, the rule will be applied to every incoming email.
- **Actions**: The action is what happens when the condition is met. Actions include things like moving to a specified folder, categorizing the email, deleting the email, forwarding the email, and flagging the email.
- **Exceptions** (Optional): Exceptions to the conditions prevent the rule from being applied to certain emails. Exceptions include things like emails from particular senders, with particular subjects, sent only to you, and with specific words in the email.

Rules Wizard

The Rules Wizard walks you through creating simple rules based on templates.

1. On the **Home ribbon**, click on the **Rules button** and select **Manage Rules & Alerts**.
2. Click on the **New Rule** button.
3. Select the desired template and click on the **Next > button**.

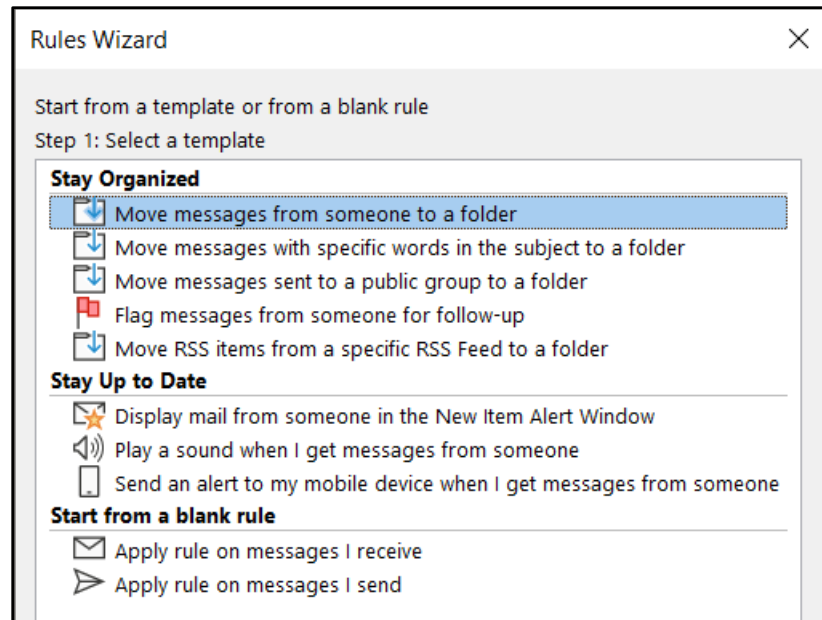


FIGURE 6-1

4. Under **Step 1**, check the boxes to add additional conditions, if any.
5. Words in blue are variables that you can change. Under **Step 2**, click on the variables to change them.

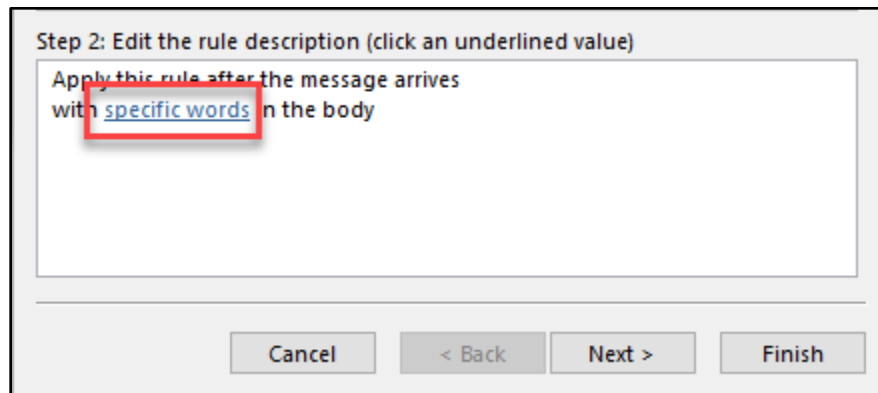


FIGURE 6-2

6. Click on the **Next > button**.
7. Under **Step 1**, check the box(es) next any additional action(s), if any.
8. Words in blue are variables that you can change. Under **Step 2**, click on the variables to change them.
9. Click on the **Next > button**.
10. Under **Step 1**, check the box(es) next the desired exception(s), if any.
11. Words in blue are variables that you can change. Under **Step 2**, click on the variables to change them.
12. Click on the **Next > button**.
13. Name the rule.

14. Optionally, to apply the rule to all emails in your inbox, under **Step 2**, check the box for **Run this rule now on messages already in "inbox."**
15. Click **Finish**.

Create Rules from Existing Emails

You can also create rules from existing emails. Doing so pre-populates many of the fields for you.

Simple Rules

The simplest rules to create use sender, subject, and/or recipient as the condition and move the email into a specified folder or create an alert as the action.

1. Find an email that meets your conditions.
2. Right-click on the email and select **Rules ► Create Rule...**
3. The Create Rule dialog will pre-populate with information from the email, including the sender, the subject, and the recipients. Check the box next to the desired condition(s).
4. Check the box next the desired action(s).
5. Click **OK**.

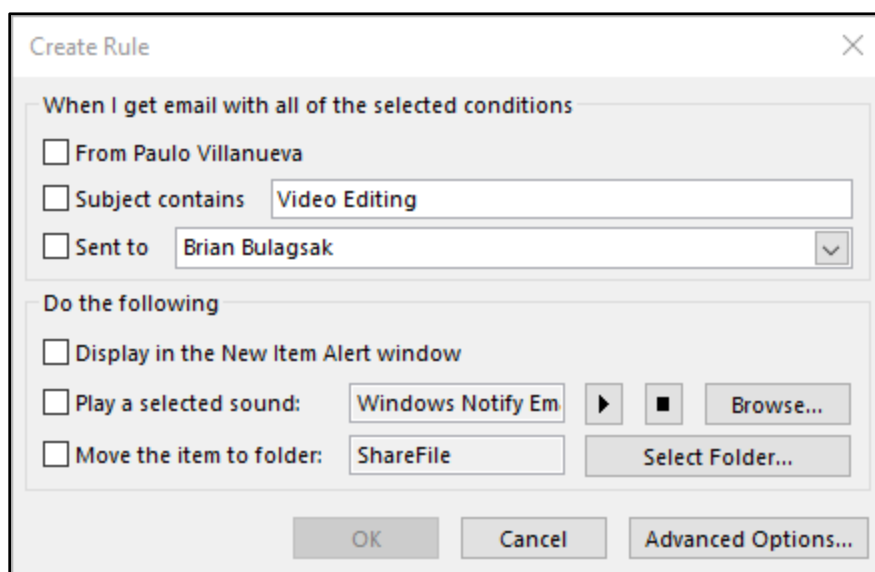


FIGURE 6-3

More Complex Rules

You can create more complex rules from existing emails, you just need to use the advanced options.

1. Find an email that meets your conditions.
2. Right-click on the email and select **Rules ► Create Rule...**
3. Click on the **Advanced Options... button**.
4. Under **Step 1**, check the box(es) next the desired condition(s).

5. Words in blue are variables that you can change. Some of these variables will be pre-populated from the email you selected. Under **Step 2**, click on the variables to change them.

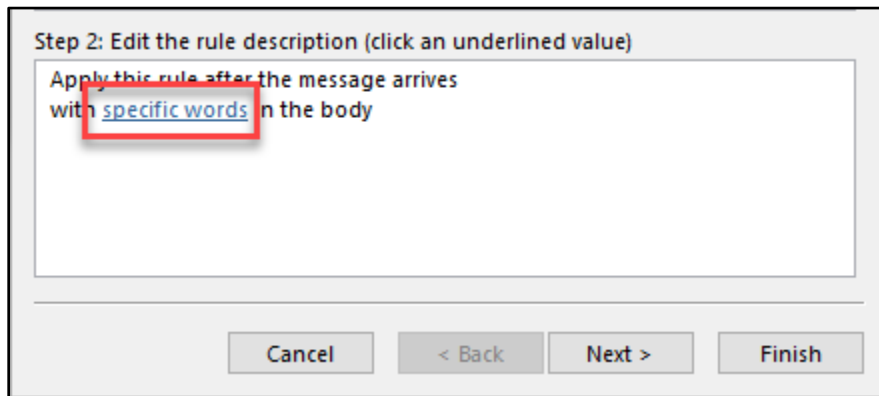


FIGURE 6-4

6. Click on the **Next > button**.
7. Under **Step 1**, check the box(es) next the desired action(s).
8. Words in blue are variables that you can change. Some of these variables will be pre-populated from the email you selected. Under **Step 2**, click on the variables to change them.
9. Click on the **Next > button**.
10. Under **Step 1**, check the box(es) next the desired exception(s), if any.
11. Words in blue are variables that you can change. Some of these variables will be pre-populated from the email you selected. Under **Step 2**, click on the variables to change them.
12. Click on the **Next > button**.
13. Name the rule.
14. Optionally, to apply the rule to all emails in your inbox, under **Step 2**, check the box for **Run this rule now on messages already in "inbox."**
15. Click **Finish**.

Example Rules

Delay Send Email by One Minute

Instructions to set up a rule to delay sending mail by one minute (in case you change your mind):

1. On the **Home ribbon**, click on the **Rules button** and select **Manage Rules & Alerts**.
2. Click the **New Rule** button.
3. Select **Apply rule on messages I send** and click **Next**.

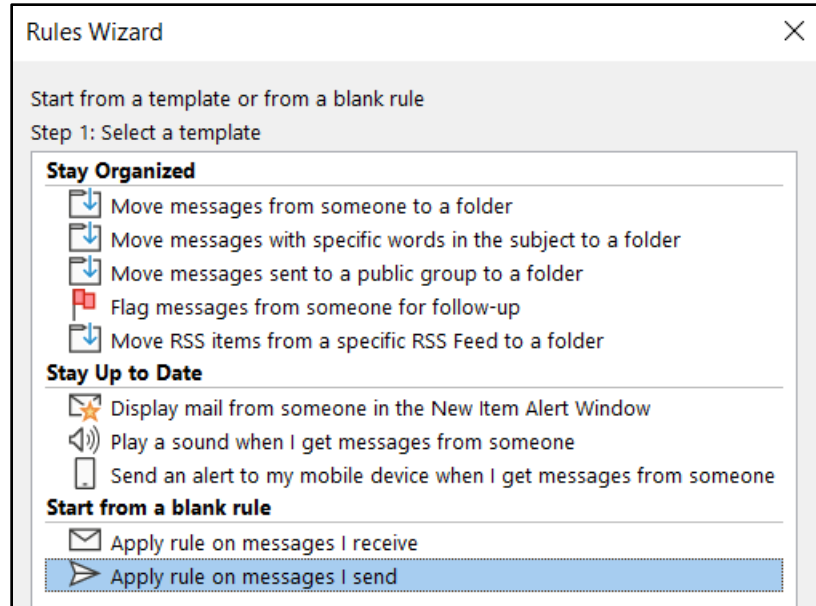


FIGURE 6-5

4. On the next screen ("which conditions do you want to check"), don't check anything (you want this rule to apply to every email you send) and click the **Next** button at the bottom. You'll see the following dialog (click **Yes**):

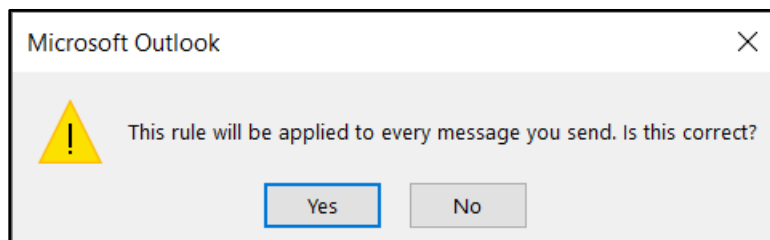


FIGURE 6-6

5. In the next screen, check **defer delivery by a number of minutes**, and then click the hyperlink for **a number of** at the bottom of the screen and enter the number of minutes you want to delay your email. Click **OK**.

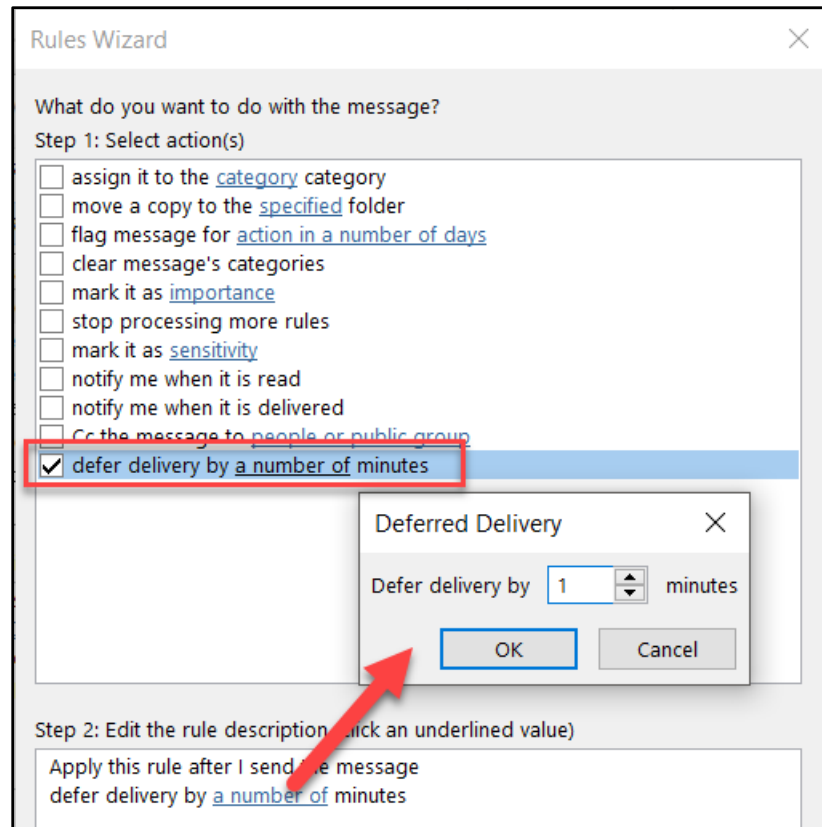


FIGURE 6-7

6. Click **Next** and add any exceptions (for people you don't want to delay email to).
7. Click **Next**, name your rule "Delay" (or anything else you want to name it) and click **Finish**.

Keep Track of Delegated Email

Many people forward email to others to deal with but have a difficult time remembering what they delegated for follow up purposes. Here's a rule that will help.

1. On the **Home ribbon**, click on the **Rules button** and select **Manage Rules & Alerts**.
2. Click the **New Rule** button.
3. Select **Apply rule on messages I receive** and click **Next**.

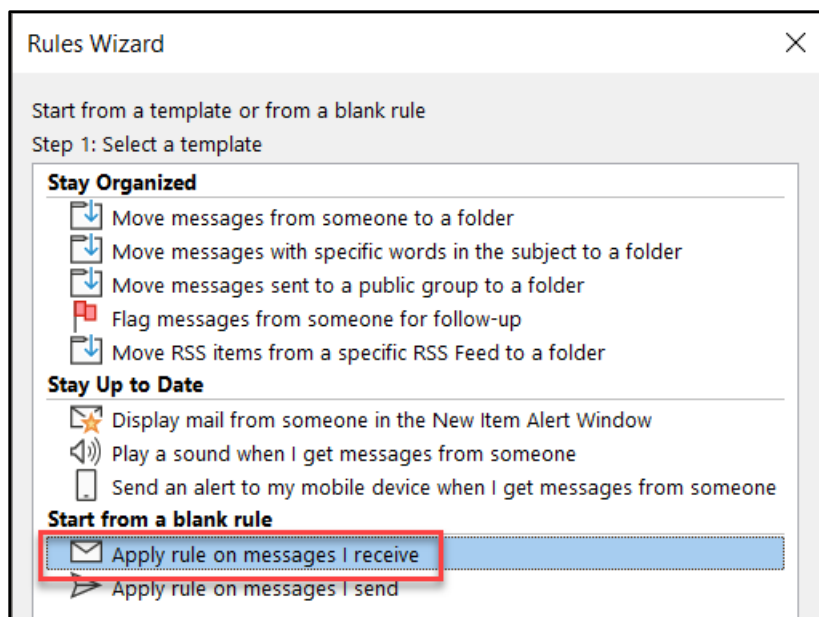


FIGURE 6-8

4. Under "Which conditions do you want to check?," check BOTH **from people or public group** and **where my name is in the CC box**. At the bottom of the dialog, click the hyperlink for **people or public group** and add your email address. We're basically creating a rule that will look for emails from you and copied to you. Click **Next**.

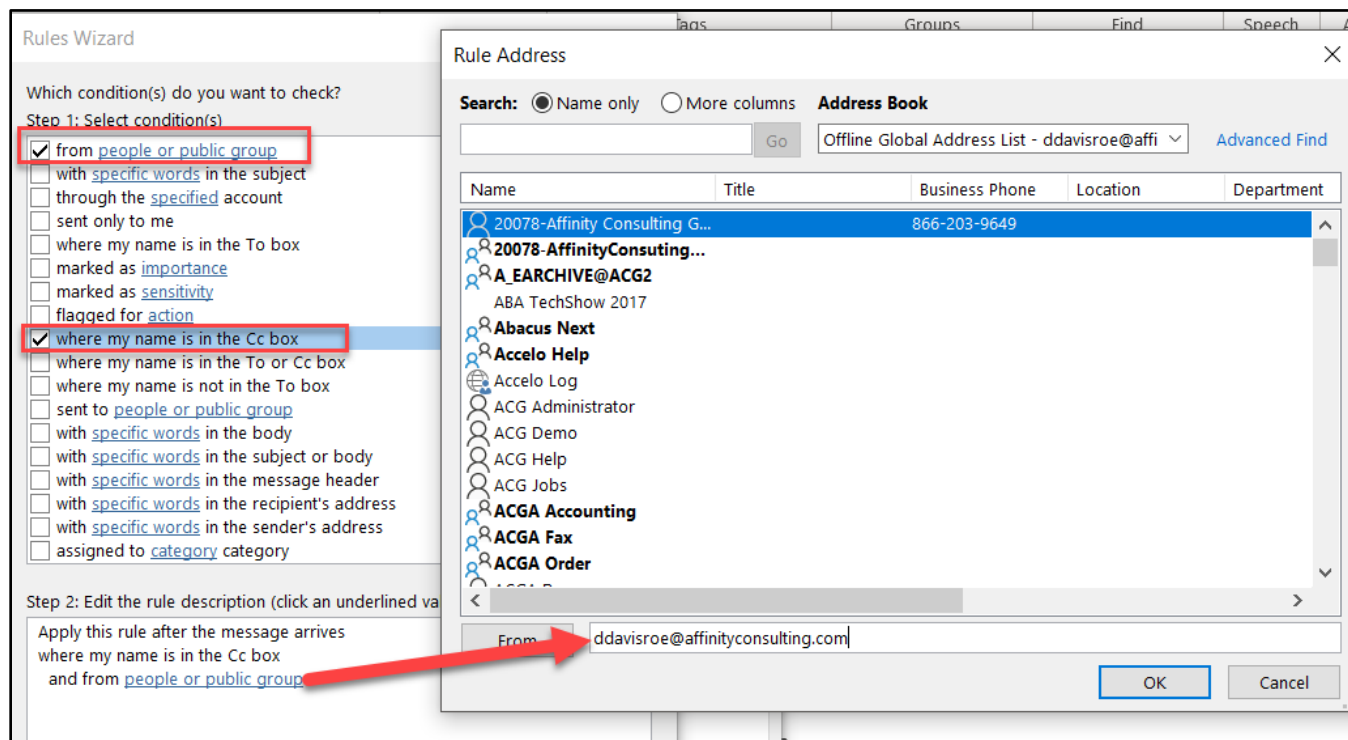


FIGURE 6-9

5. Under "What do you want to do with the message?" choose **move it to the specified folder**. Make the specified folder your Delegated Mail folder. Click **Next** and add any exceptions. Click **Next**, name it and click **Finish**.

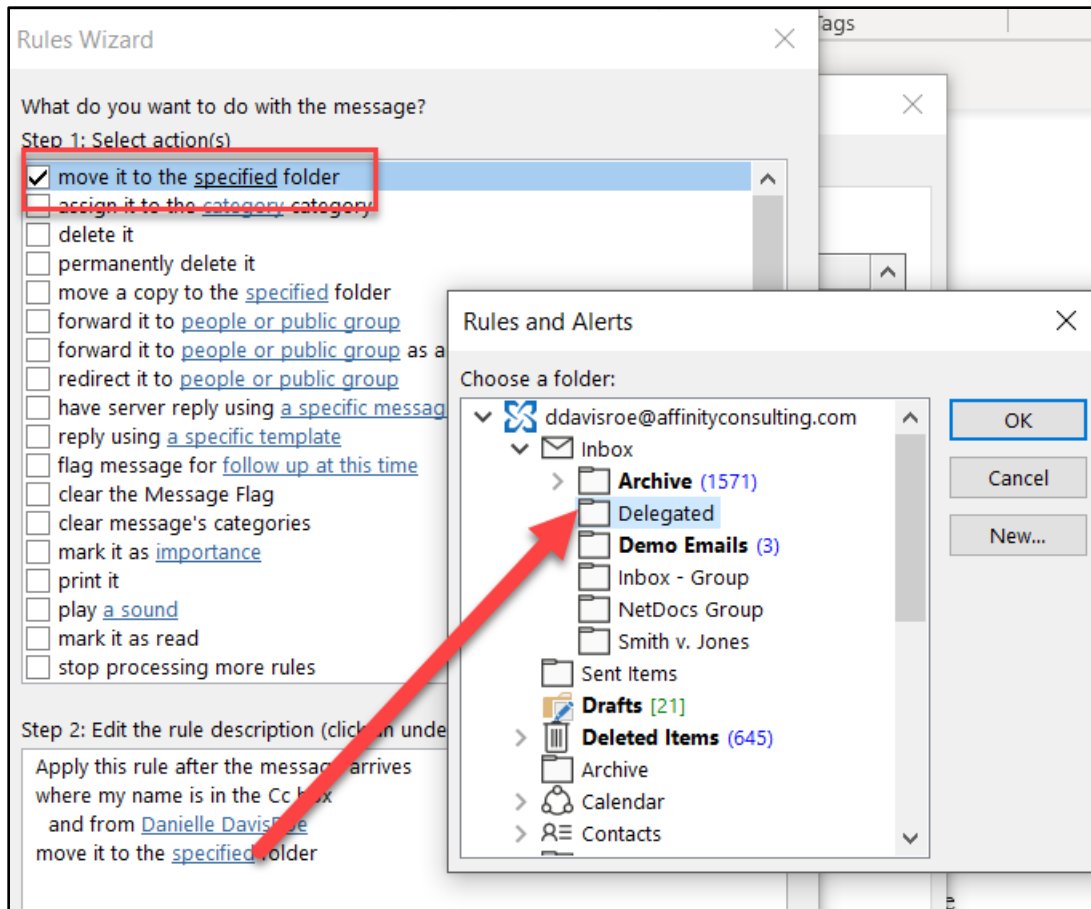


FIGURE 6-10

Manage Rules

Turning Off Rules

Turn rules off by un-checking them in the Rules and Alerts dialog.

1. On the **Home ribbon**, click on the **Rules button** and select **Manage Rules & Alerts**.
2. Uncheck the boxes next to any rules you want to turn off.

Reordering Rules

Rules are processed in the order in which they are listed in the Rules and Alerts dialog. The order may make a difference if more than one rule applies to an incoming email.

1. On the **Home ribbon**, click on the **Rules button** and select **Manage Rules & Alerts**.
2. Use the up and down arrows to reorder the rules.

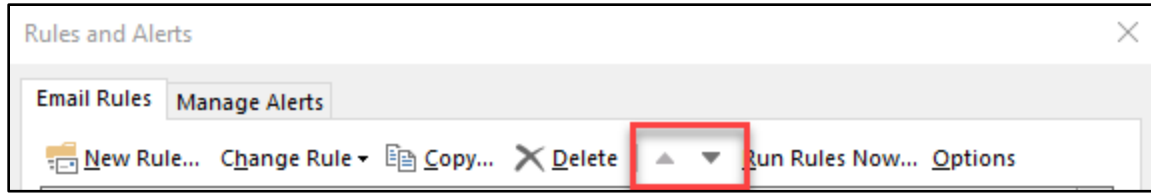


FIGURE 6-11

Stop Processing Rules

Sometimes, when a condition is met and a rule is applied, you want to stop processing other rules. Stop processing rules is an action that can be added to any rule. See below for instructions on how to edit any existing rules.

Editing Existing Rules

You can edit any existing rules through the Rules and Alerts dialog.

1. On the **Home ribbon**, click on the **Rules button** and select **Manage Rules & Alerts**.
2. Click on **Change Rule**.
3. Select **Edit Rule Settings...**

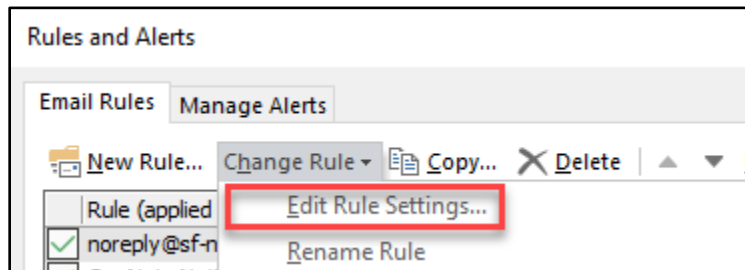


FIGURE 6-12

CHAPTER 7

EMAIL: QUICK STEPS

Can't find it? Something missing? Instructions not clear? Email manuals@affinityconsulting.com.

Quick steps are used to automate repetitive steps. Unlike rules, they are not automatically applied. You must click on a button or use a shortcut key to invoke the quick step. Because they are not automatically applied, there are no conditions or exceptions to set up. Quick steps can be used for things such as moving email to a folder, deleting email, marking it as read, flagging it, categorizing it, creating appointments, or replying/forwarding.

Creating Quick Steps

1. On the **Home ribbon**, in the **Quick Steps group**, click on **Create New**.

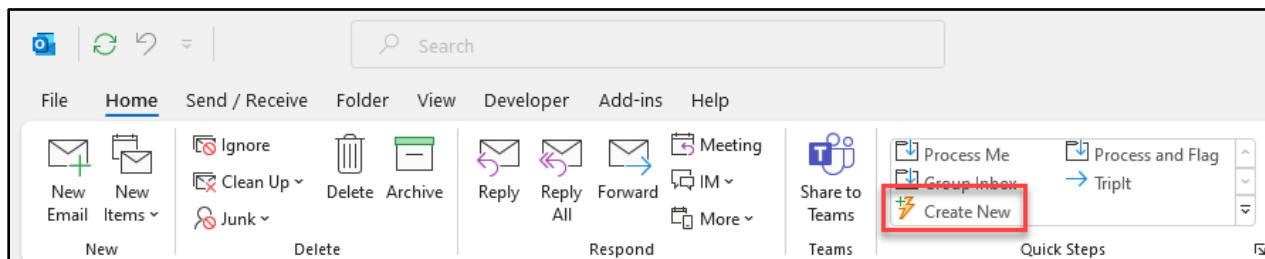


FIGURE 7-1

2. Name your quick step.
3. Choose an Action and complete any necessary fields for that action.
4. Click on the **Add Action button** to add any additional actions.
5. Click **Finish**.

Example Quick Step: Forward Emails

If you frequently forward emails to the same person or group of people, setting up a quick step can reduce the number of clicks it takes to forward emails in the future.

1. On the **Home ribbon**, in the **Quick Steps group**, click on **Create New**.

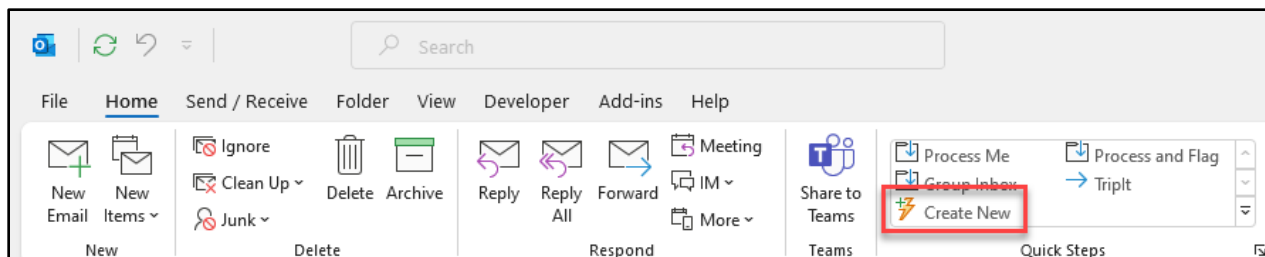


FIGURE 7-2

2. Name your quick step.
3. Under **Choose an Action**, select **Forward**.
4. In the **To** field, enter the emails address(es) of the recipients.
5. Click on **Show Options**.

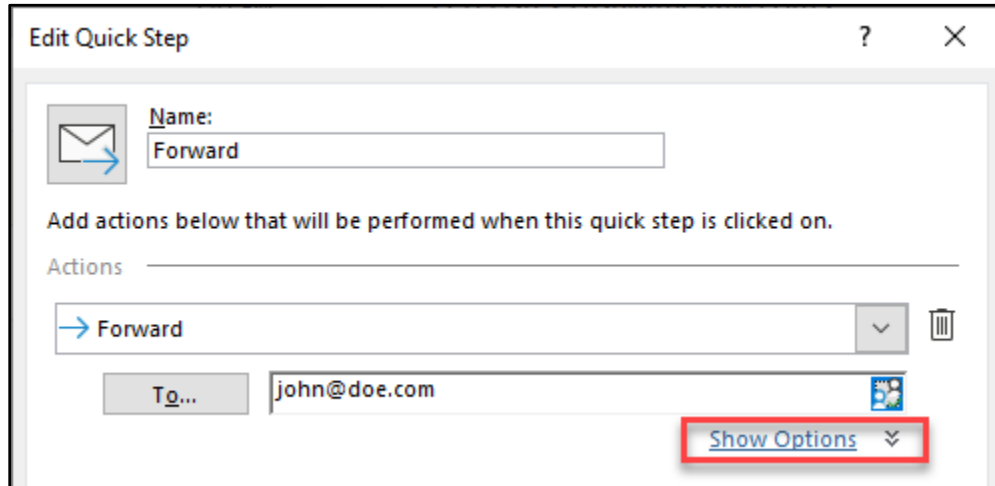


FIGURE 7-3

6. Add cc or bcc addresses, change the subject, set a flag, or mark the importance, if desired.
7. Add default text to the body of your email (if desired) with the **Text** field.

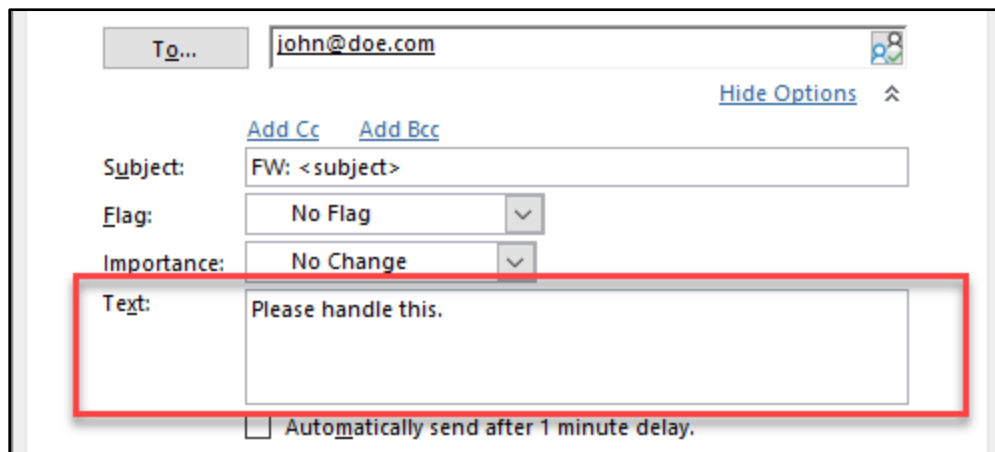


FIGURE 7-4

8. To automatically send the email, check the box to **Automatically send after 1 minute delay**. If you do not check this box, the forward will open. You will have the opportunity to change the email recipients or text, but you must click send to forward the email.
9. To move the forwarded email out of your inbox and into another folder, click on the **Add Action** button.
10. Under **Choose an Action**, select **Move to a Folder**.
11. Under **Choose Folder**, select the desired folder.
12. Click **Finish**.


Using Quick Steps

After the quick steps are set up:

1. Select the email(s) you want to apply the quick steps to.
2. On the **Home ribbon**, in the **Quick Steps group**, click on the name of the quick step.

Assigning Keyboard Shortcuts

You can assign keyboard shortcuts for up to 9 quick steps:

1. On the **Home ribbon**, in the **Quick Steps group**, click on the  button, and select **Manage Quick Steps**.
2. Select the quick step and click **Edit**.
3. Under **Shortcut key**, select a shortcut key.

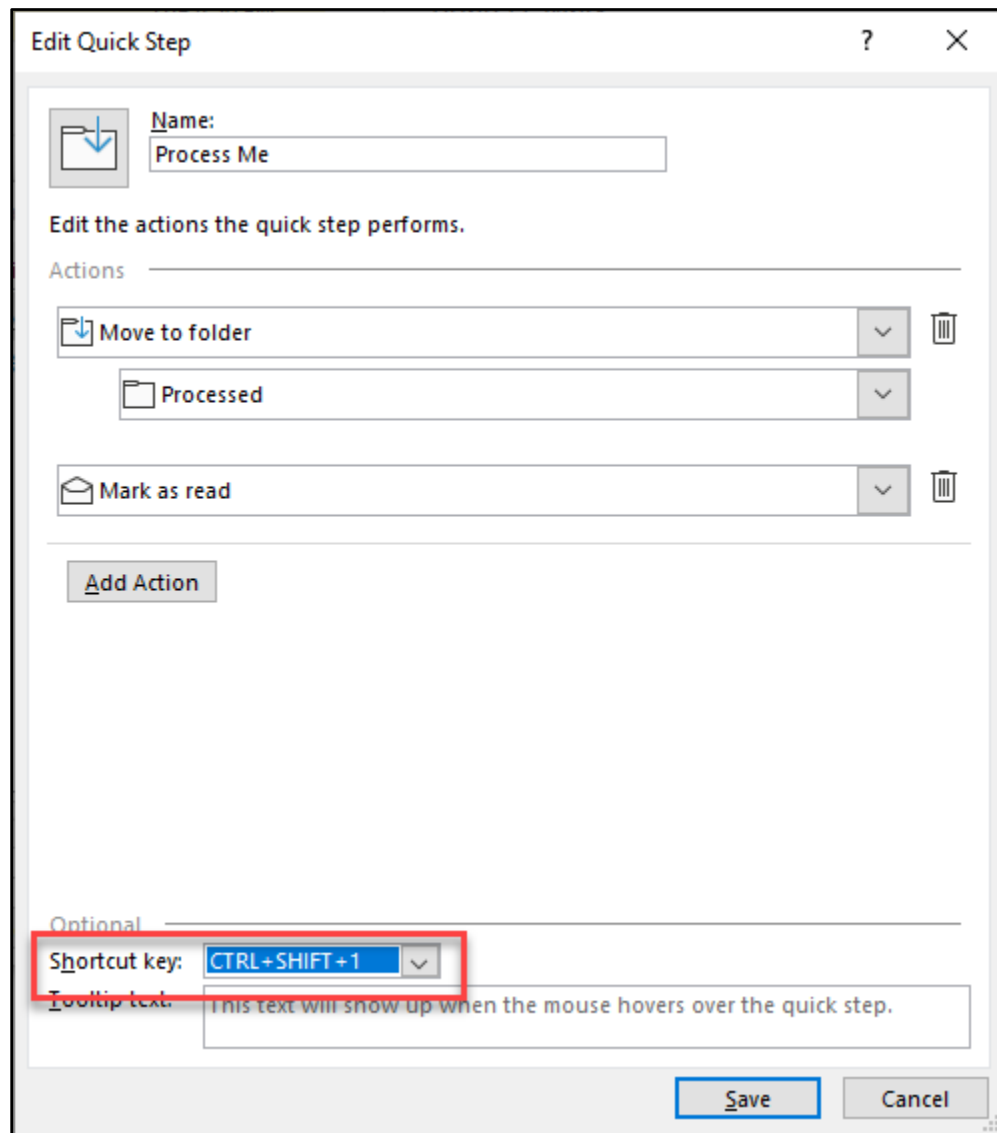



FIGURE 7-5

Managing Quick Steps

To manage your quick steps, on the **Home ribbon**, in the **Quick Steps group**, click on the  button, and select **Manage Quick Steps**. From the Manage Quick Steps dialog you can edit quick steps, duplicate them, delete them, reorder them, or create new quick steps.

CHAPTER 8

EMAIL: STORAGE AND INBOX CLEAN UP

Can't find it? Something missing? Instructions not clear? Email manuals@affinityconsulting.com.

Mailbox Cleanup

Mailbox Cleanup helps you manage the size of your email by find emails of a certain age or size, autoarchiving email, emptying your deleted items folder, and deleting conflicts. Access it by clicking **File menu** → **Info tab (left side)** → **Tools** → **Mailbox Cleanup...** button.

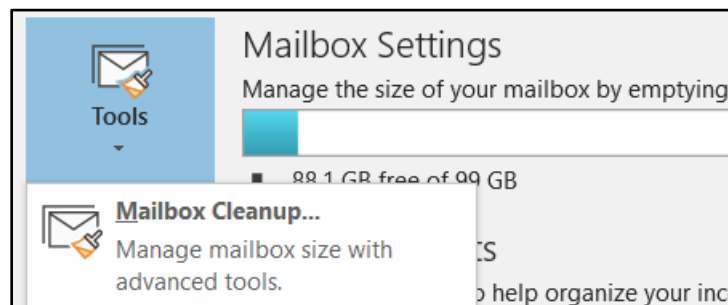


FIGURE 8-1

Removing Redundant Messages

An email conversation is also known as a thread. Many people have multiple emails in their Outlook folders which are earlier pieces of the same thread. The last email in time contains the entirety of the conversation so the older ones aren't needed. Clean can remove the redundant messages from your inbox for you. Any email with a unique attachment will be retained in your inbox. Your sent items will not be affected.

1. On the **Home ribbon**, click the **Clean Up** button in the **Delete group**.

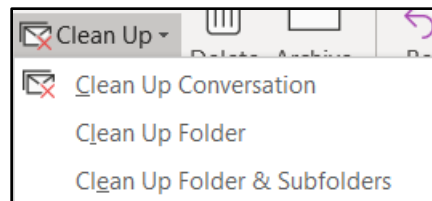


FIGURE 8-2

2. Click one of the following:
 - **Clean Up Conversation:** The current Conversation is reviewed, and redundant messages are deleted.

- **Clean Up Folder:** All Conversations in the selected folder are reviewed, and redundant messages are deleted.
- **Clean Up Folder & Subfolders:** All Conversations in the selected folder and any folder that it contains are reviewed, and redundant messages are deleted.

Archive Old Outlook Email

Outlook users end up with an enormous accumulation of email in their Sent Mail and Deleted Mail folders. Furthermore, some mail is sorted into subfolders and forgotten about. All of this will start to bog down servers and PCs as those databases of emails get larger and larger. Thankfully, Outlook has an excellent way to dealing with this problem - AutoArchive. In a nutshell, AutoArchive will allow you to a) permanently delete expired items, b) delete, or c) archive old items to an archive file (archived database). Conveniently, the first time AutoArchive runs, it creates the archive database for you. It is stored on the C:\ by default so you'll either want to move it to a server folder or back it up directly from your C:\. Once it has established itself, you'll see the Archive folder in your Outlook Folder List. There are two sets of AutoArchive settings: global settings and per-folder settings.

Turning AutoArchive On or Off

1. Click the **File ➤ Options ➤ Advanced ➤ AutoArchive Settings... button.**

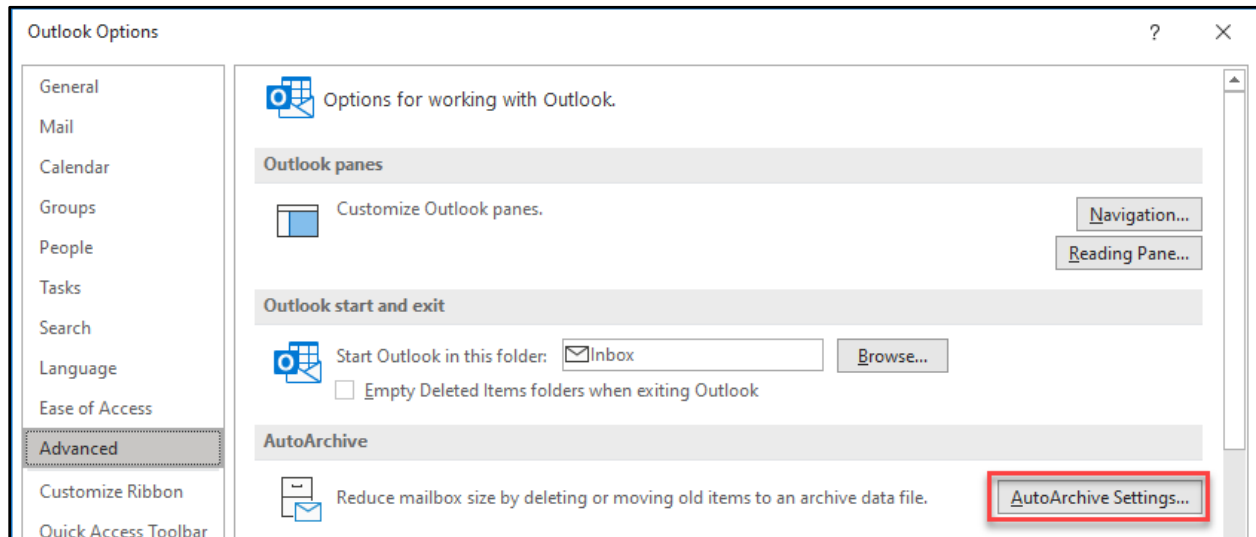


FIGURE 8-3

2. At the top of the following dialog, you'll see **Run AutoArchive every __ days**. If that box is not checked, it will not run. As you can see from the following screen shot, you have many options for this:

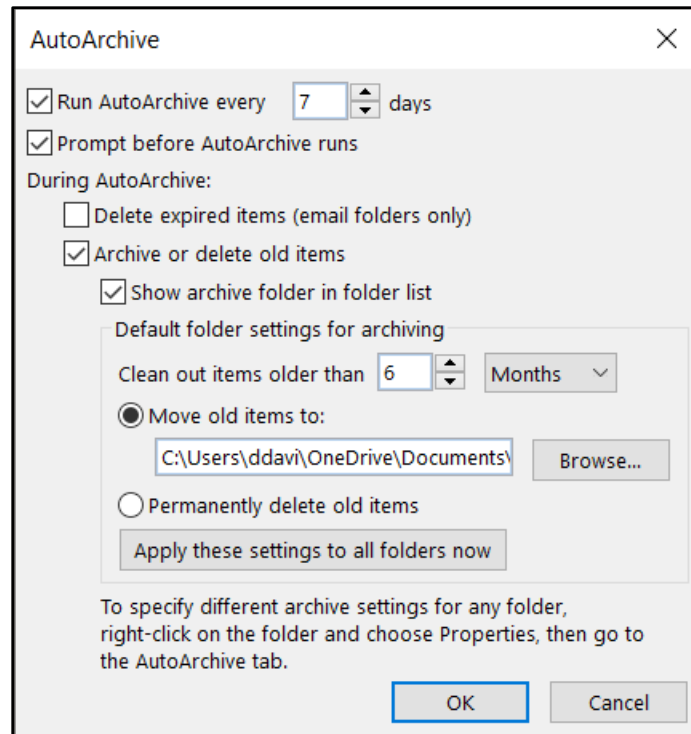


FIGURE 8-4

Controlling the Archive Settings of a Specific Folder

You can control what any folder does in Outlook by following these steps: Right-click the folder → **Properties** → **AutoArchive tab** → Make your changes and click **OK**.

Saving Email Messages Outside of Outlook

When an email message is in your Outlook inbox, it is just a record in a database and *not* a discreet document like a Word file. That fact is a big part of the problem associated with organizing and storing them. Email related to a particular matter is stored in one place; and word processor files related to that matter are stored somewhere else. However, you can create documents out of those emails and those documents can be stored with every other document related to a particular matter or issue.

Saving Email as a Document

The classic problem that law firms have if they do not own a document management system is saving and finding matter-specific email. Why? Because people (1) keep them in their individual inboxes, or (2) save them in subfolders within their own inbox (which no one else has access to), or (3) delete the email altogether. Email is valuable correspondence that in most circumstances should be saved. However, in a law firm or legal department, it should not be saved within one's own individual inbox.

As it turns out, you can save email much like you save a Microsoft Word document clicking the **File** → **Save As**. We recommend that you save as **Outlook Message Format - Unicode (*.msg)** and this is the default file type.

The significant benefit of .msg files is that they also capture any attachments. If you open an MSG file years later and the original email had a Word file and a PDF file attached to it, they will still be

there in their native form. Of course, best practice is to separately save all attachments into the public folders where others in your office can find them and not leave them *only* attached to email.

You can also save email as **Text Only** although you'll lose any formatting that was in the email and you'll lose the attachments (if any). Saving as an MSG file will retain the original formatting, look, and feel of the email, while also keeping the attachments.

Saving Email by Dragging into a File Explorer Folder

You can clean out your inbox or subfolders under your inbox by cascading the windows and simply dragging and dropping all of them into the desired folder. This will COPY the emails over into that folder, saving them automatically as MSG (native Outlook Message Format) files, which preserves the metadata and all attachments.

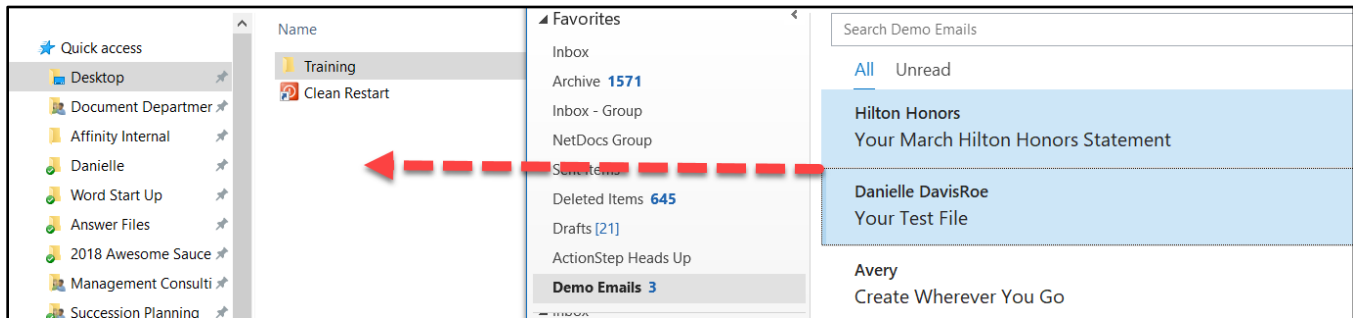


FIGURE 8-5

Saving Email with Document Management Programs (DMS)

While document management programs (NetDocuments, Worldox, iManage, etc.) were originally thought of as only word processing document repositories, that is no longer true. They can now hold just about any type of computer file (word processor, PDF, TIF, email, JPG, etc.).

NetDocuments Example

Using NetDocuments as an example, you can move email into the document management system by dragging and dropping (see below). Once profiled and saved, the emails are stored within the client/matter structure and easily searchable and accessible by anyone who uses the document management system (NetDocuments, in this case). It's also important to note that you can save them one-at-a-time or large quantities of them all at once.

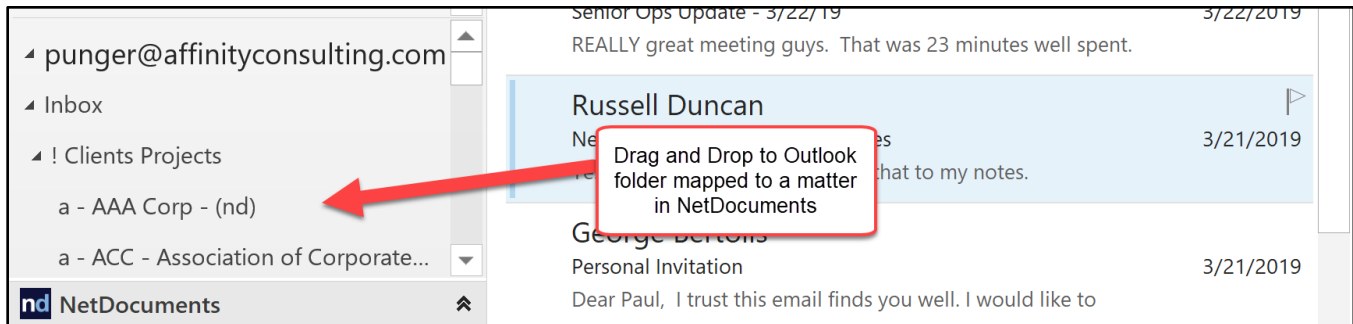


FIGURE 8-6

Saving Email Using a Case/Practice Management Program

This would include programs like Actionstep, Cosmolex, Centerbase, Clio, PracticeMaster, etc. If you have a case management program with Outlook integration, you can streamline the saving of email by saving them directly into the matter within the case management program. You can also auto-associate emails by setting up rules within the practice management program based on the sender.

Saving Email as PDF Files

If you have a PDF program which integrates with Outlook, the PDF program will install a few buttons and an additional menu in Microsoft Outlook that make saving email as PDF files easier, faster and better. For those who wish they had a good way to archive and store emails and attachments, this integration can be a lifesaver.

On some levels, saving emails as PDF files is better than saving as MSG files. That's because Acrobat is an open standard (Adobe released their patent rights to the file format in 2008). As such, you can feel pretty confident that you'll be able to open PDF files in 20 years. Further, if you use an integrated PDF program as described above, it will also capture the attachments just like MSG files do.

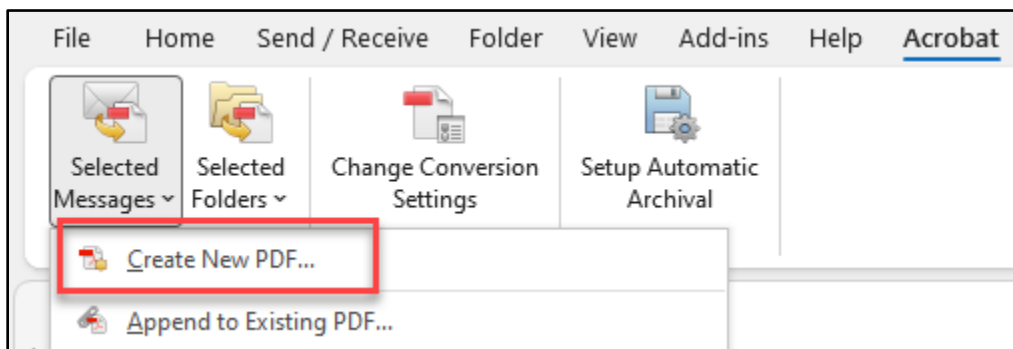


FIGURE 8-7

PDF Programs Which Integrate with Outlook

Adobe Acrobat

- **Acrobat - Creating PDFs from Individual Emails or Entire Folders:** Simply select individual emails (Ctrl + left click) or select entire folders; then click the **Adobe PDF ribbon** ➔ **Selected Messages** ➔ **Create New PDF**. This will create a single PDF which contains all of the emails you've selected **and all of the attachments thereto**.
- **Acrobat - Adding Subsequent Emails to Existing PDFs:** If you receive additional emails which need to be added to an existing PDF archive, simply choose **Selected Messages** ➔ **Append to Existing Adobe PDF**.
- **Acrobat - Automatic Archival:** Using the **Setup Automatic Archival button**, you can also setup folders to automatically archive themselves. This would be particularly useful if you have setup Outlook rules to automatically sort your email into specific folders and then use Acrobat to automatically archive it.

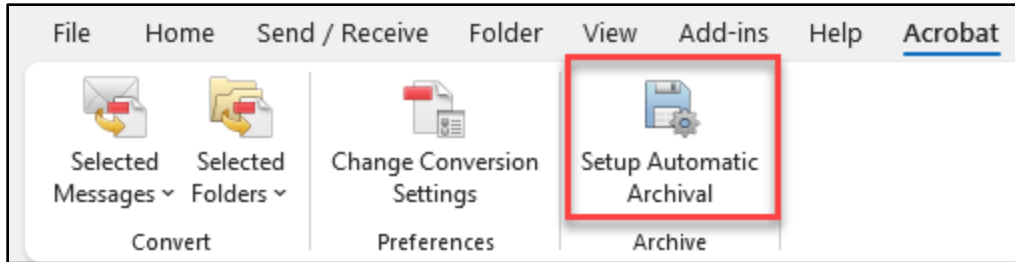


FIGURE 8-8

Saving PDFs Without Acrobat

Other PDF programs that cost a lot less than Acrobat offer similar functionality to that described above with Outlook. For example, all of the following are fantastic:

- **Kofax Power PDF Advanced:** Matches features of Acrobat Professional. Windows only.
- **Kofax Power PDF Standard:** Matches features of Acrobat Standard. Windows only.
- **Foxit PDF Editor Pro:** Very strong feature match with Acrobat Pro. Windows only.
- **Foxit PDF Editor:** Strong match with Acrobat Standard. Windows only.
- **Nitro Productivity Suite:** Nitro Pro (included with the suite, but which cannot be purchased separately) matches the features of Acrobat Professional. Windows only.

If you have Outlook and one of the foregoing programs but *don't* see any special buttons in Outlook, there are several possible causes.

- **Incompatibility:** The first possibility is that your versions of each program aren't compatible. For example, if you have Outlook 2019 and Acrobat 10, you're not going to get the integration because Acrobat 10 isn't compatible with Outlook 2019. Instead, you need to upgrade to Acrobat DC which is compatible with Outlook 2019.
- **Installation Order:** The second possible cause is the order of installation. For example, assume you have Outlook 365 and Acrobat DC. Those two versions are compatible for the integration to work. However, if you installed Acrobat first and then Outlook, you're not going to see the buttons. When you install Acrobat, it needs to find Outlook already on your computer in order to install its integration. In this case, you might need to re-install Acrobat so it can find your Outlook installation and add the integration.
- **Add-In Disabled:** Outlook add-ins get disabled sometimes. To re-enable them, go to **File** ➔ **Options** ➔ **Add-Ins** ➔ **Go...** and check the box to re-enable the add-in.

Email Storage Tips

Store Email with Other Related Files

Store the email in the same location as other electronic files related to any particular matter. Any system that requires you to save email separately from other electronic files related to a matter is inadequate.

Delete or Archive Email Once Stored

After an email is stored into a folder or a document management system, delete or archive it. Keep Outlook as clean as possible.

Always Separately Save Attached Documents

Outlook is NOT a document management system and should not be used as a document repository. Documents attached to Outlook emails are actually stored in a temporary folder structure that is incredibly convoluted and is normally hidden. For example, the attachment to an email I just opened is stored in my hard drive under this folder:

C:\Users\barron\AppData\Local\Microsoft\Windows\Temporary Internet Files\Content.Outlook\OOT0A5E5

For the record, that's 8 folders deep and the structure from \Temporary Internet Files down is not even visible in Windows Explorer. The point is, it is incredibly easy to lose attached documents that aren't saved separately (unless you have a document management system that saves attachments at the same time the email itself is saved).

Stop Printing Email

If you've saved email digitally, then they're easily searchable and printing them to throw in paper files only makes your paper files fatter, harder to manage and harder to search.

Benefits of Storing Email Outside of Outlook

No Worry About Email Storage Limitations

If you offload the email in your Outlook folder structure and save them as separate files or in other programs, then you can get them out of Outlook. As such, the IT folks will stop complaining that you're overloading the Exchange server and your computer will operate faster.

Everyone Else Can Find Them Too

Once saved as separate files, others in your office will be able to find these important client communications. You're on your way to building a complete digital file.

Searchable Like All Other Documents

If you're saving into a document management system, then the content of all email stored therein is searchable. If the email is stored as separate files (PDFs, MSG files), then there are free or very inexpensive search programs that can help you find any of them by the words contained inside them.

Saving Attachments to Email

Open the email, right click the attachment, and choose **Save As**. To save all attachments once, choose **Save All Attachments**.

CHAPTER 9

EMAIL: DEALING WITH SPAM

Can't find it? Something missing? Instructions not clear? Email manuals@affinityconsulting.com.

If unwanted emails are flooding your email, you can use Outlook's junk email settings to send emails to your junk email folder.

Junk Mail Options

You'll find the junk mail options on the **Home ribbon** → **Delete group** → **Junk button** → **Junk Email Options**.

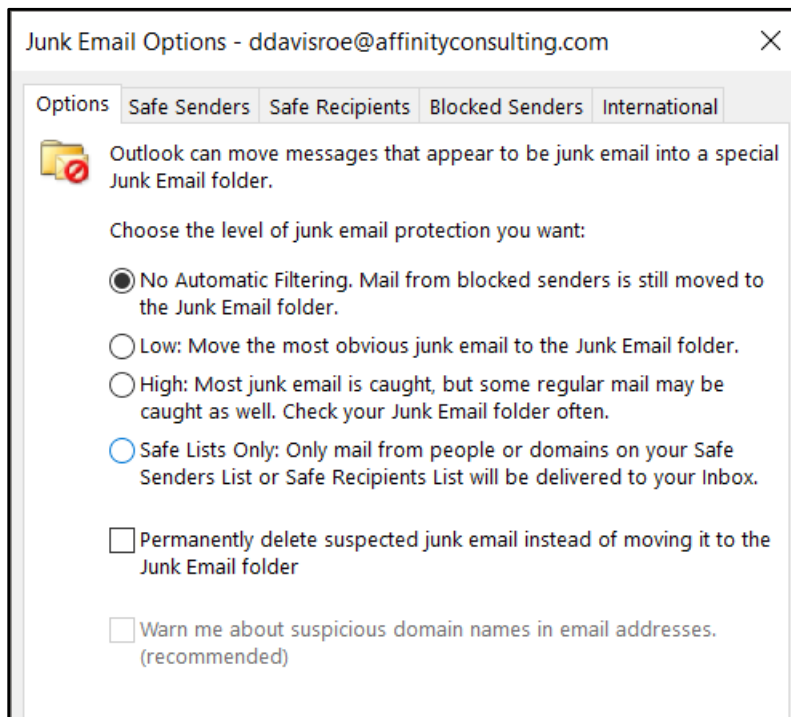


FIGURE 9-1

Select **No Automatic Filtering** if you do not want Outlook to automatically filter suspected spam into your junk email folder. Use this you use another service to quarantine spam for you.

If you select **Safe Lists Only**, Outlook will send all email to your junk email folder unless the sender has been added to your safe senders or recipients list.

Low or **High** will use AI to determine which emails are likely spam and filter them into the junk email folder accordingly.

Checking the box to permanently delete suspected junk email will skip your junk email folder. If any legitimate email is suspected of being spam, you will not be able to retrieve it.

Block Senders

The easiest way to do this is to right-click on an email from a sender you want to block in the future. Right-click the email, choose **Junk ➔ Block Sender**. You can also block all emails from someone at the sender's domain.

Safe Senders

To add someone to your safe senders list, right-click on an email from them, and choose **Junk ➔ Never Block Sender**. You can also add the sender's domain to your safe senders list, ensuring you never miss an email from someone at that domain.

Managing Blocked and Safe Sender Lists

Open your junk email options: **Home ribbon ➔ Delete group ➔ Junk button ➔ Junk Email Options**.

Open the Safe Senders tab to see a list of safe email addresses and domains. To remove one, click on it and click on the **Remove button**.

Open the Blocked Senders tab to see a list of blocked email addresses and domains. To remove one, click on it and click on the **Remove button**.

CHAPTER 10

CALENDAR

Can't find it? Something missing? Instructions not clear? Email manuals@affinityconsulting.com.

Configuring the Calendar View

Almost everything in the calendar view can be turned on or off from the controls on the View tab. The diagram below shows the controls for the various panels.

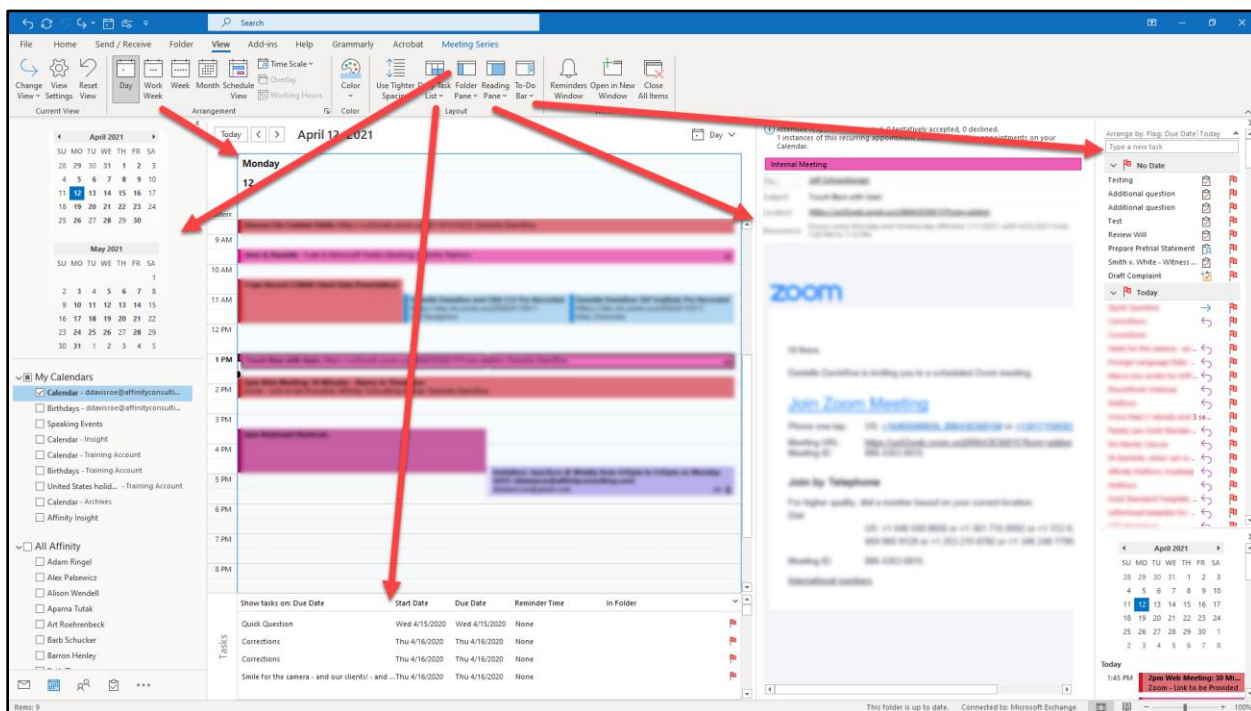


FIGURE 10-1

To see tasks underneath the calendar, activate the “Daily Task List” on the View tab.

Creating Appointments and Meetings

An appointment is an event on your calendar. A meeting is an appointment that others are invited to. Create either from the **Home ribbon** using the **New Appointment** or **New Meeting** buttons. Alternatively, you can click on the start time on your calendar and press **Ctrl + Shift + A**.

Converting an Appointment to a Meeting

You can make an appointment a meeting by clicking on the **Invite Attendees** button on the **Appointment** ribbon.

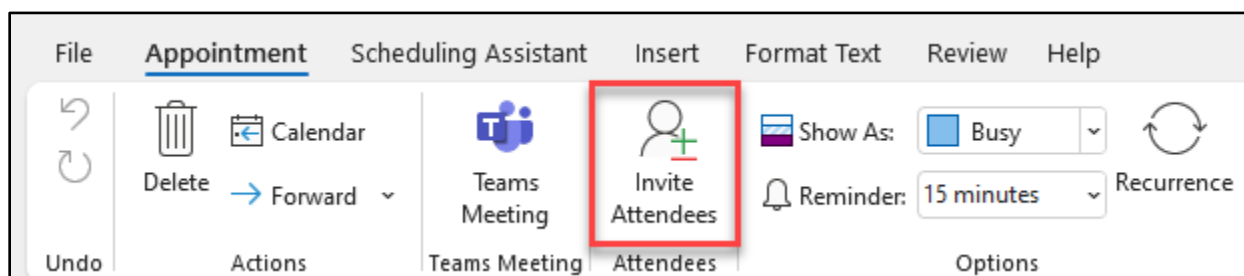


FIGURE 10-2

All-Day Appointments

You can schedule an all-day appointment by checking the **All day** box.

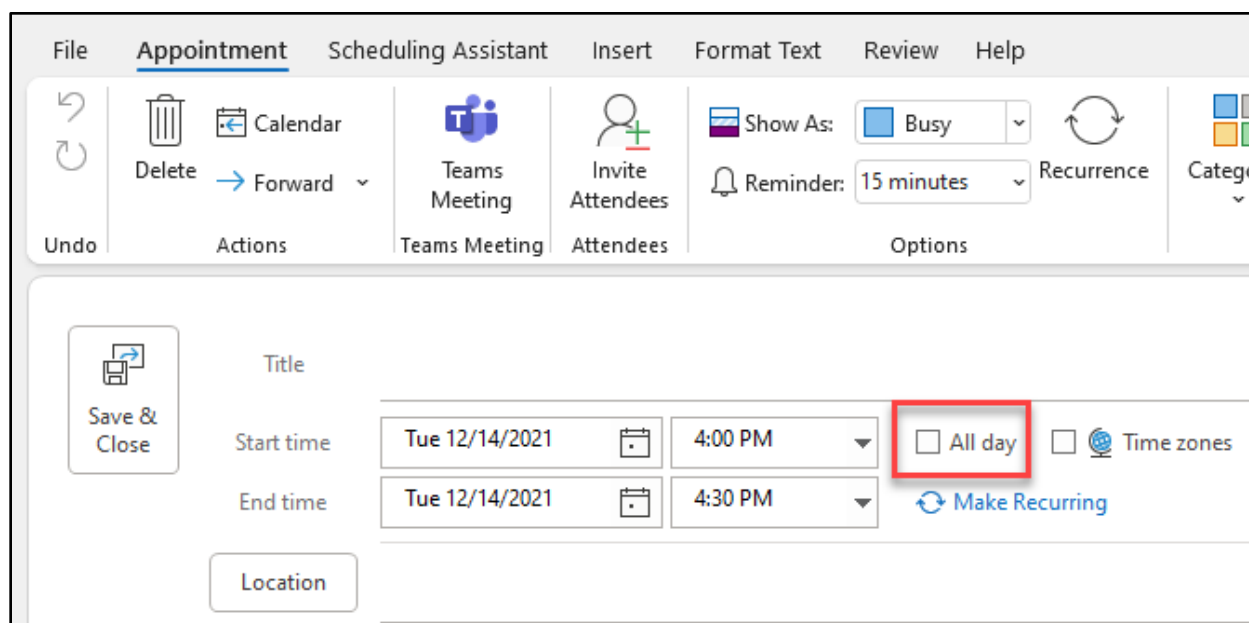


FIGURE 10-3

All day appointments show up at the top of the calendar. If others have access to your calendar, it can be easy for them to miss all day appointments. Therefore, many people schedule all day events from 8 am to 5 pm to make them hard to miss.

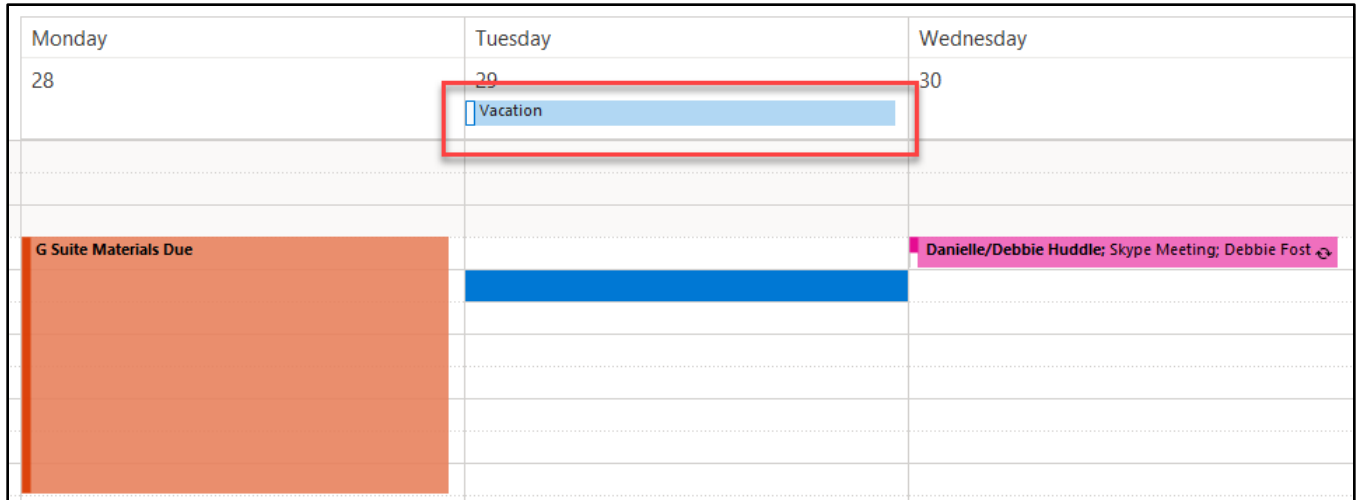


FIGURE 10-4

Making Appointment Private

Right click on calendar and select “Private.” No one you share your calendar with will be able to see the details of the appointment. Outlook will continue to show the time of the appointment as busy.


Adding Attachments to Appointments

You can add attachments to appointments by dragging and dropping files into the Notes field or using the **Attach File button** on the **Insert ribbon**.

Duplicating an Appointment

Hold down the control key and drag the appointment to a different date or use **Ctrl + C** to copy the appointment and **Ctrl + V** to paste it. You will need to then send any meeting invitations on a duplicated appointment.: open the meeting and click on the **Send button**.

Recurring Appointments

Recurring appointments are denoted by a  symbol.

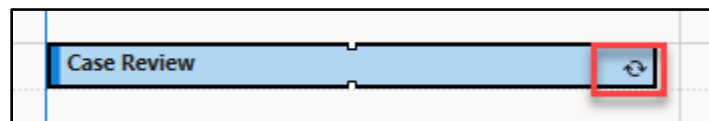


FIGURE 10-5

To make an appointment a recurring appointment, click on the **Recurrence button** on the **Appointment ribbon**.

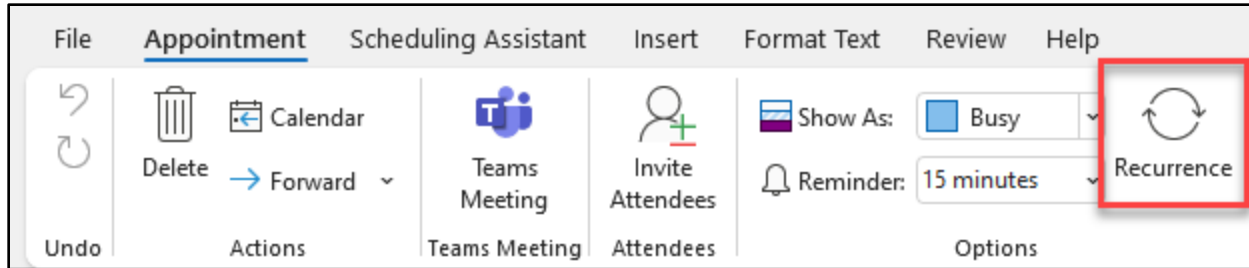


FIGURE 10-6

Recurrence Pattern

Daily recurrence is used for appointments that occur every day, every weekday, or a specific number of days apart.

Weekly recurrence is used for appointments that recur on the same day(s) of the week every week or a specific number of weeks apart.

Monthly recurrence is used for appointments that occur on the same day each month, whether that is the 14th day or the first Friday every month or a specific number of months apart.

Yearly recurrence is used for appointments that occur on the same day each year, whether that is the 14th day of September or the first Friday or May every year or a specific number of years apart.

Range of Recurrence

The recurrence can continue indefinitely or can end after a specific number of occurrences or on a certain date.

Changing Recurring Appointments

When opening a recurring appointment, Outlook will ask whether you want to open just this appointment or the entire series. Open just this appointment to make any changes specific that one occasion. Open the entire series to makes changes to all appointments.

Appointments that differ from the series are denoted with slash through the recurrence symbol.

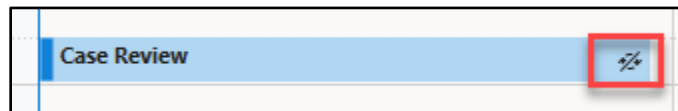


FIGURE 10-7

If you later edit the times or days of the series, any changes you made to specific appointments will be overwritten by the new recurrence.

Scheduling Meetings

Scheduling meetings can be challenging when everyone has a busy schedule. Luckily, Outlook has some tricks you can use to make finding time to meet easier.

Scheduling Assistant

For those whose calendars you are able to see (see page 70), you can use the Scheduling Assistant to see their availability when scheduling meetings.

1. On the **Home ribbon**, in the **New group**, click on **New Meeting**.
2. Click on the **Scheduling Assistant** tab.
3. Click on **Add required attendee** or **Add optional attendee** to add someone's availability.

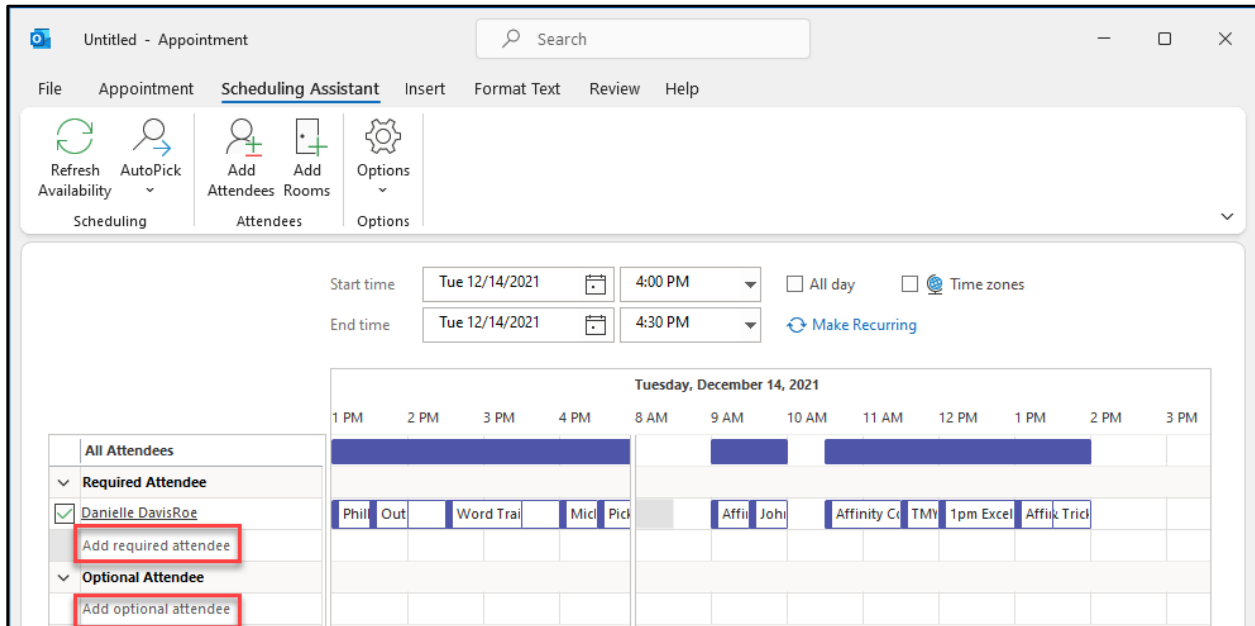


FIGURE 10-8

Add-In: FindTime

FindTime is an Outlook add-in that makes it easier to schedule meetings with people outside of your organization.

Installing FindTime

Start by installing it from the app store:

1. On the **Home ribbon**, click on **Get Add-Ins**.
2. Search for **FindTime**.
3. Click on the **Add button**.

Using FindTime

To use FindTime when drafting an email:

1. Add required attendees to the **To field**.
2. Add optional attendees to the **Cc field**.
3. On the **Message ribbon**, click on **New Meeting Poll**.
4. In the **FindTime pane**, availability will be shown by color. Hover over the silhouette to see the individual's name.
 - Green: Available
 - Red: Unavailable

- Gray: Unknown (people outside your organization or whose calendar you do not have permissions to see)
 - Underlined: Required Attendee
5. Click on times to offer them as possible meeting times for the attendees.

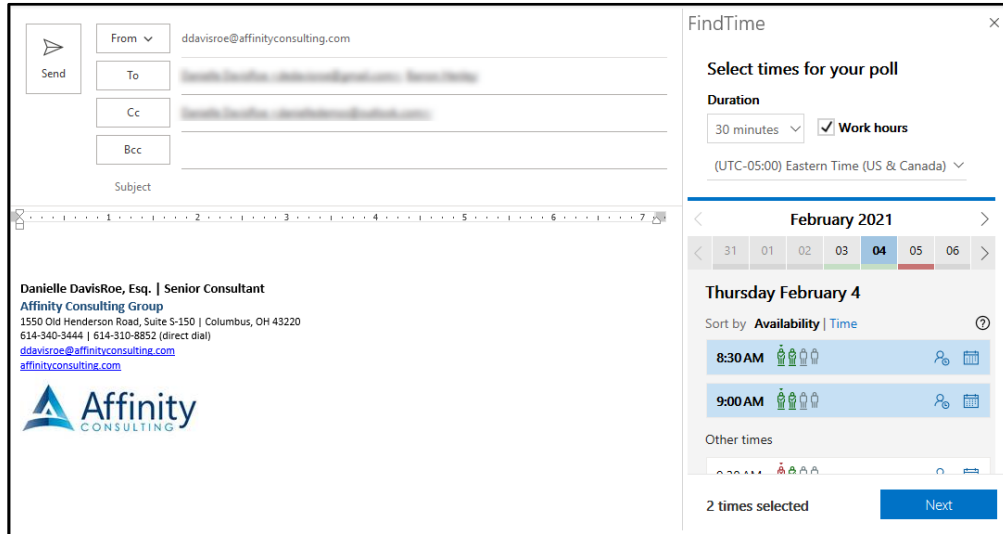


FIGURE 10-9

6. Click **Next**.
7. Change the settings as desired and click on **Add to email**.

Attendees will receive a link with the proposed meeting times. They will be prompted to select their name from the list of attendees and can get specify which times work for them.

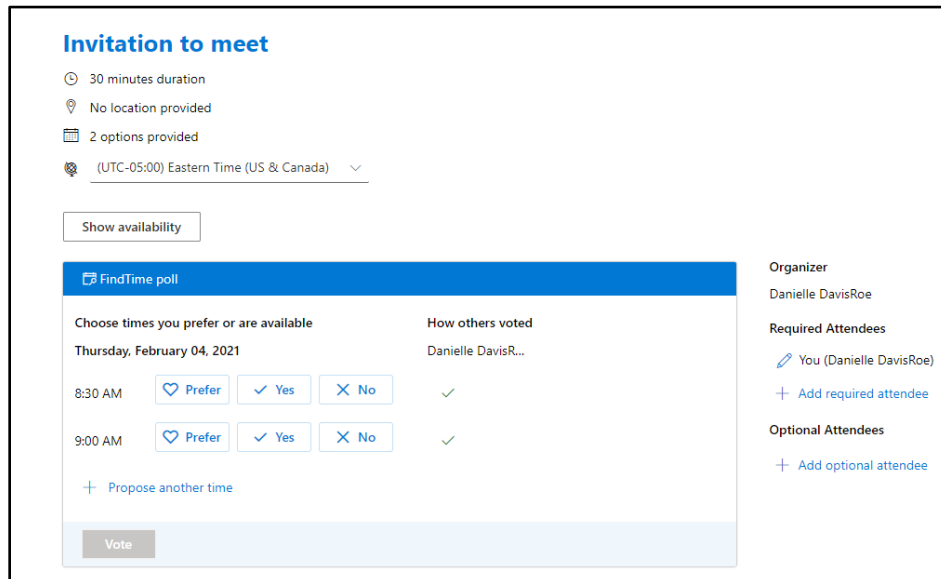


FIGURE 10-10

Rooms

If your organization uses Outlook to schedule conference rooms or other locations, you can add that room directly to your calendar appointment or use the Room Finder to locate an available room.

Scheduling a Room

To schedule a room to an appointment or meeting:

1. Click on the **Location button**.
2. Double-click on the name of the room.
3. Click **OK**.

Checking Room Availability

To check what rooms are available for an appointment or meeting:

1. On the **Scheduling Assistant ribbon**, click on **Add Rooms**.
2. Double-click on the names of the rooms.
3. Click **OK**.
4. On the **Room Finder pane**, see which rooms are available at which times.

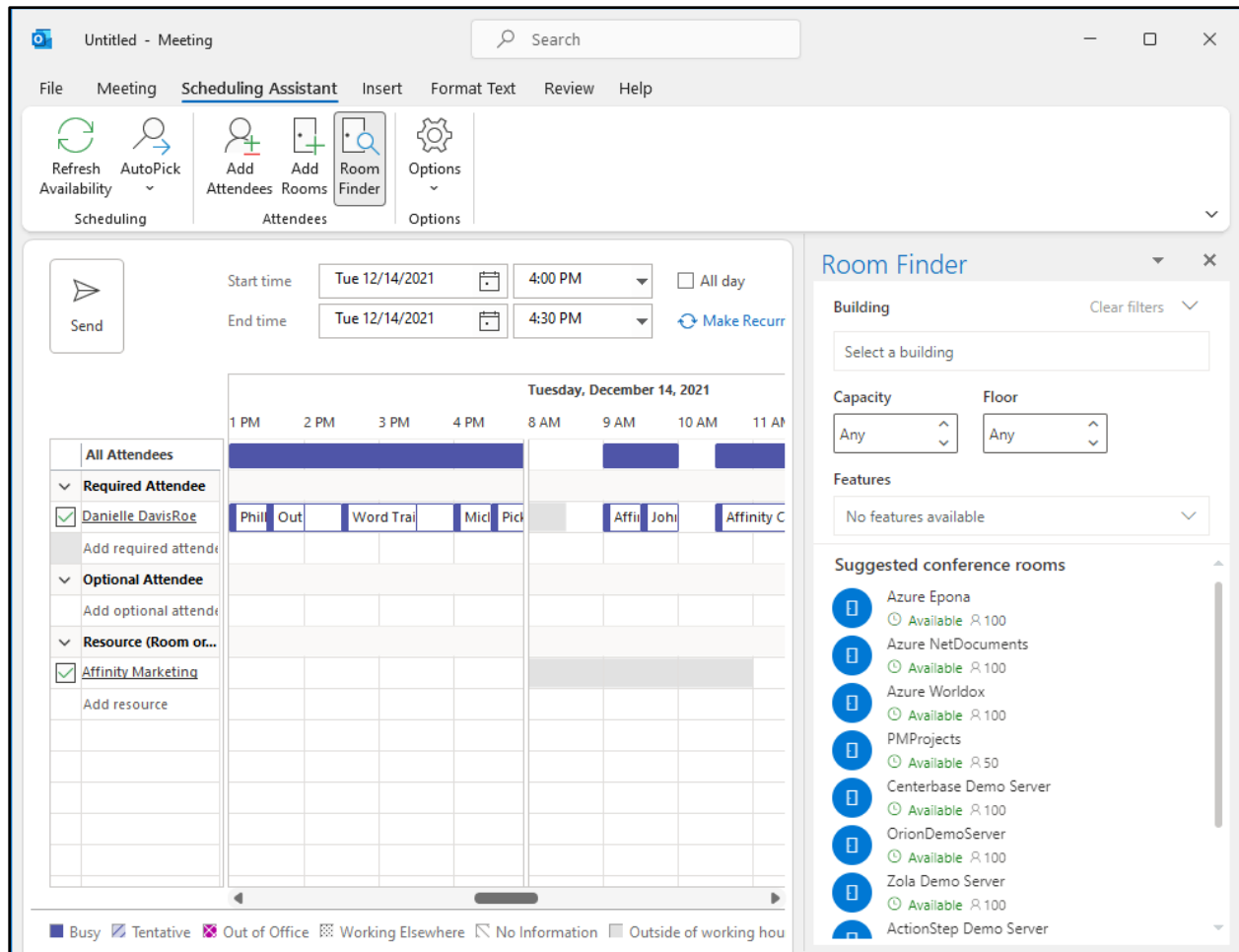


FIGURE 10-11

Viewing Your Calendar Arrange Options

You can easily switch between a single day view, your work week, the full week, and a month use the arrange buttons found on the **Home** and **View** ribbons.

Go To

The **Home ribbon's Go To** options allow you to quickly navigate to the current day or see the next 7 days.

Viewing Non-Contiguous Days Side-By-Side

To view non-contiguous days side-by-side:

1. Go to your Outlook calendar and click on the **Day button**.
2. Left click on the first day you want to see.
3. Now hold down on the Ctrl key and left click the rest of the days.

Move an Appointment by Dragging It

If an appointment gets moved, the easiest way to make the change on your calendar is by dragging it to the new day. When you're in the calendar in Outlook, the "Folder Pane" on the left side of the screen can be re-sized to show you multiple months. An appointment from the right side of your screen can be dragged to any day you see on the left.

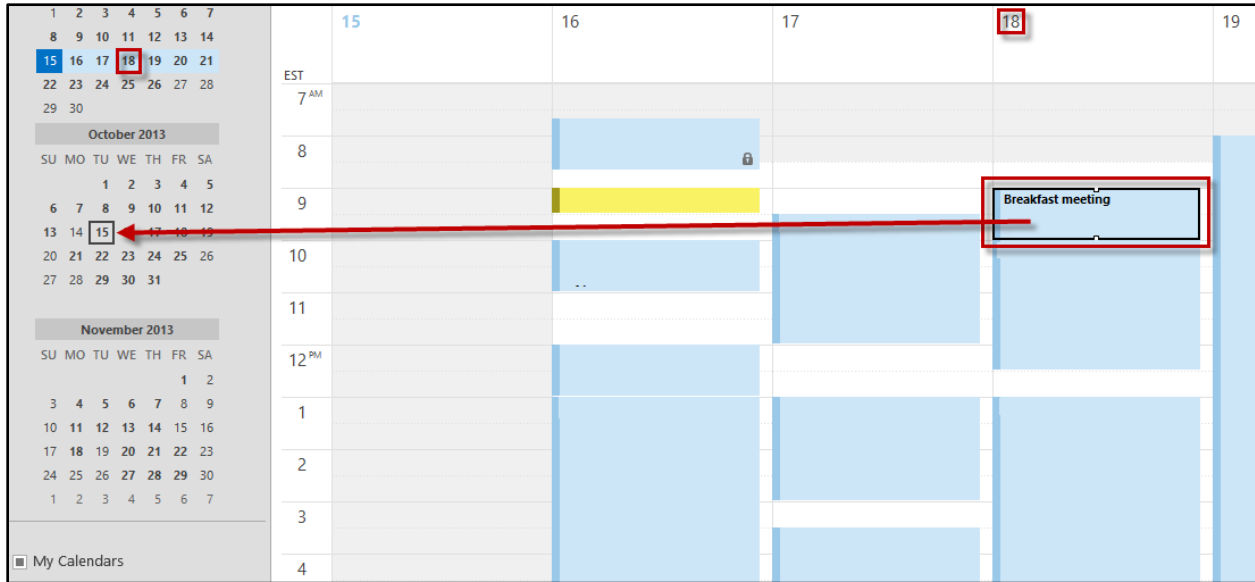


FIGURE 10-12

If you want to copy the appointment rather than move it, follow the steps above, but hold down on the Ctrl key at the same time.

Reminders

Outlook allows you to add one pop up reminder to each appointment. If you need additional reminders, you'll need to create separate appointments to remind you. Alternatively, you can set the reminder for the first time you want reminded and then snooze the reminder when it pops up.

Sharing Calendars

Opening a Shared Calendar

Click **Open Calendar** on the **Home tab** and then **Open Shared Calendar** or **File→Open→Other User's Folder**.

Sharing Your Calendar

Click **Share Calendar** on the **Home tab** to send an invitation.

Giving Elevated Permissions

Click **Calendar Permissions** on the **Home tab**, click the user, then set the permissions and click **OK**.

Creating Calendar Groups

Select **Calendar Groups** on the **Home tab** and **Create new calendar group**. Add calendars or rearrange calendars by dragging and dropping from another group.

CHAPTER 11

PEOPLE

Can't find it? Something missing? Instructions not clear? Email manuals@affinityconsulting.com.

Creating New Contacts

On the **Home ribbon**, click on **New Contact**, drag and drop email on People button, or right-click on email address and select **add to contacts**.

People View

Outlook defaults to the “new” People view by default. To change back to an older view, just click a different view in the **Current View box** on the **Home ribbon**. The new people view has a streamlined interface and a streamlined editing dialog box for contacts. The people view also tries to aggregate contacts: if the same person is in Outlook twice, the people pane will recognize the same name, link the contact cards, and present them as one card.

Contact Groups

If you routinely send email to a group of people, you can create a distribution list or contact group which will make it much easier. To create one, go to your **Contacts** in Outlook ➔ **New Contact Group button (Home ribbon)** ➔ name the group and add the appropriate email addresses.

Quick Contact Search

For the Quick Contact Search, just hit the **F11** key and type in a first or last name.

Default Outlook to Your Contacts Address Book

When you click the TO button in a new Outlook email, if you have Microsoft Exchange, it defaults to Global Address List which is your internal contact list. This forces you to switch to "Contacts" from the drop-down list every time in order to search your Outlook contacts for an email address. Click **Mail** in Outlook ➔ on the **Home ribbon**, click the **Address Book button** ➔ **Tools menu** ➔ **Options** ➔ under **When opening the address book...** choose **Contacts**.

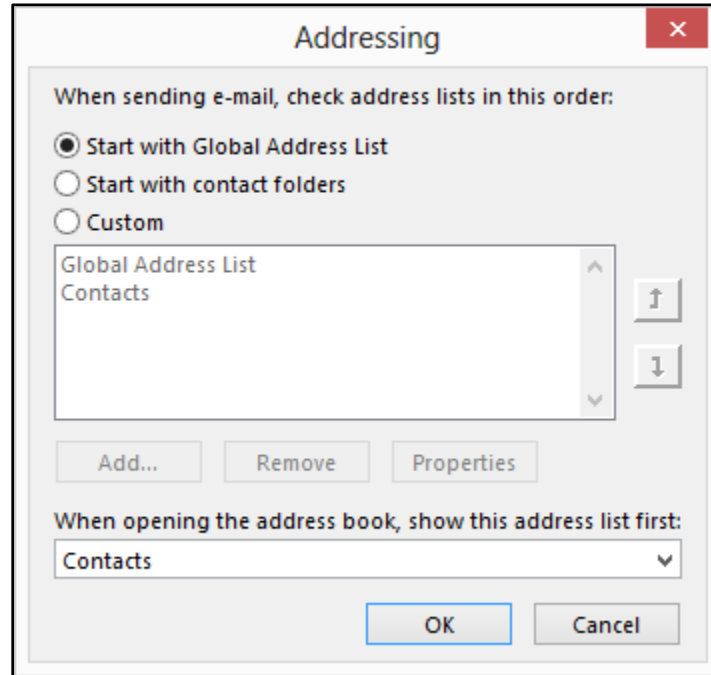


FIGURE 11-1

CHAPTER 12

TASKS

Can't find it? Something missing? Instructions not clear? Email manuals@affinityconsulting.com.

Configuring the Tasks View

Almost everything in the tasks view can be turned on or off from the controls on the View tab. The diagram below shows the controls for the various panels.

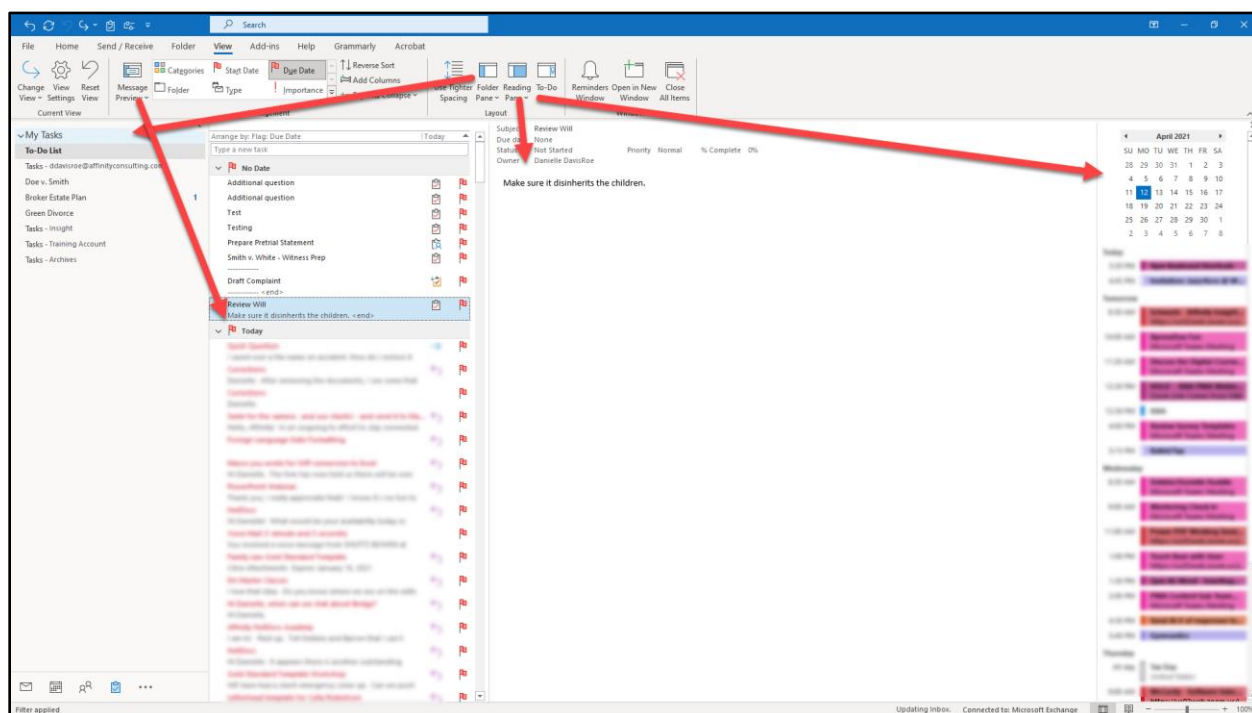


FIGURE 12-1

Tasks vs To-Do List

A task is a separate item in a task folder. One or multiple task folders can be created (for example a task folder could be created for an individual project). The To-Do List aggregates all of the flagged items (emails) and all of the tasks from all of the folders into one list. Think of the To-Do List as a “master task list.”

Creating Tasks

Click **New Task** on the **Home ribbon** or drag and drop email to Task button or screen.

Setting Task Reminder

Check the Reminder box below the task end date and set a reminder date and time.

Hiding Completed Tasks

To hide completed tasks, click **View Settings** on the task **View ribbon**, then **Filter**, then **Advanced**, and add **Complete equals No** to the list.

Assigning Tasks

Open the task, click Assign Task, enter an email address, and click send. The Assignee now becomes the owner of the task and is the only one that can make changes to it. The Assignee can also send status reports back to the Assignor. There is a built-in view under **Change View** to view assigned tasks in a folder.

Flags

Flagging an email will make the email appear in the To-Do list, but that is not the same as creating a task. A flagged email will disappear off the To-Do list if the email is deleted. However, a task created from an email (via drag and drop) creates a separate task item, independent of the email. An independent task item will stay on the task list even if the original email is deleted.

Flags are a great way to alert you to follow up on an important email, especially if your plan is to delay action with the email for a day or so. Simply right click on the desired email and select **Follow Up** and then select the desired follow-up flag.

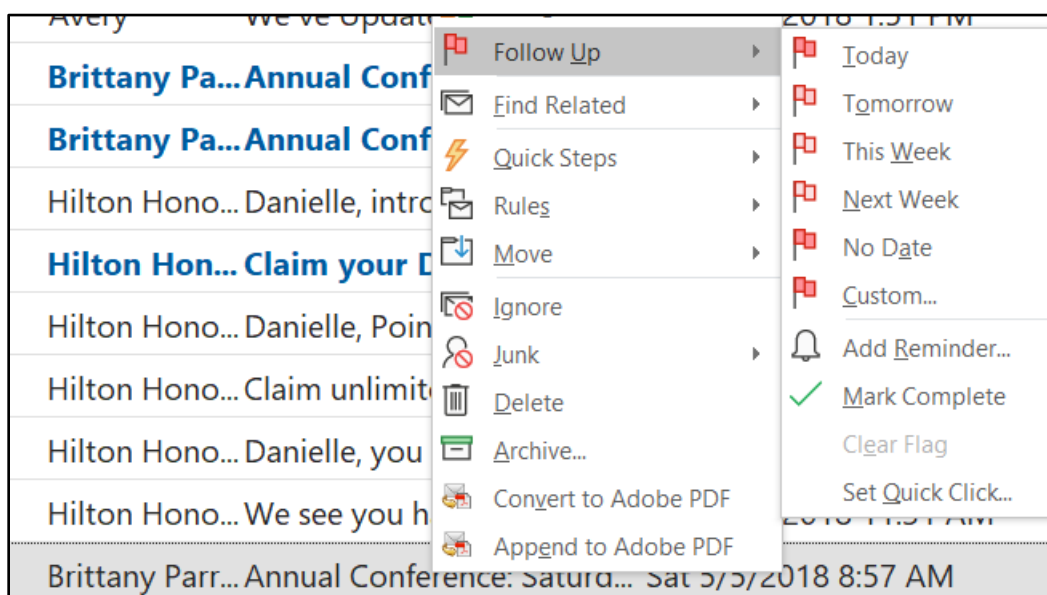


FIGURE 12-2


You can set a custom date as well. Outlook will notify alert you on the date and time specified.

FIGURE 12-3

CHAPTER 13

MICROSOFT TO DO

Can't find it? Something missing? Instructions not clear? Email manuals@affinityconsulting.com.

Microsoft To Do is the online and app interface for Outlook tasks. Use To Do in tandem with Outlook tasks or without ever using tasks in Outlook. You can access it by logging into office.com, using the Windows app, or downloading the app to your mobile devices. To Do is available within Outlook for 365 users, by clicking on the  navigation button.

Interface

To Do is organized into smart lists and lists, available from the navigation pane on the left-hand side.

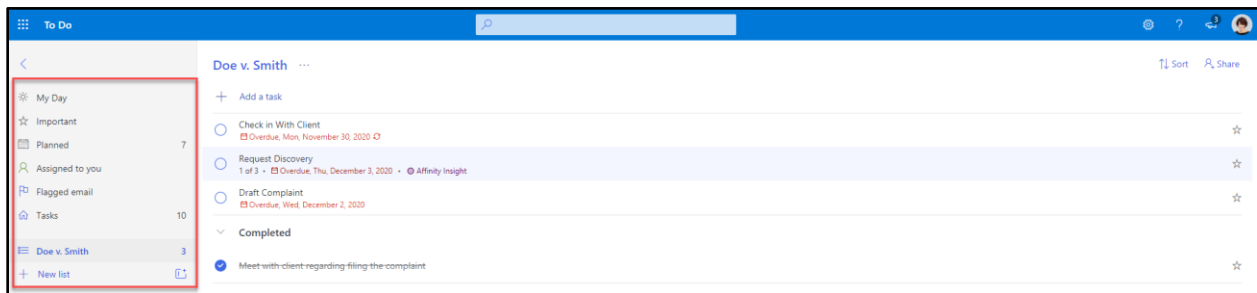


FIGURE 13-1

To collapse the navigation pane to just icons, click on the **<** button at the top of the pane.

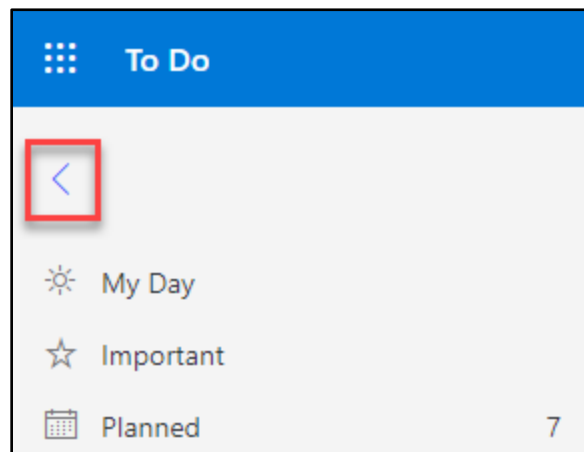


FIGURE 13-2

Task Details

To open the task pane to view details about a task, click on the name of the task.

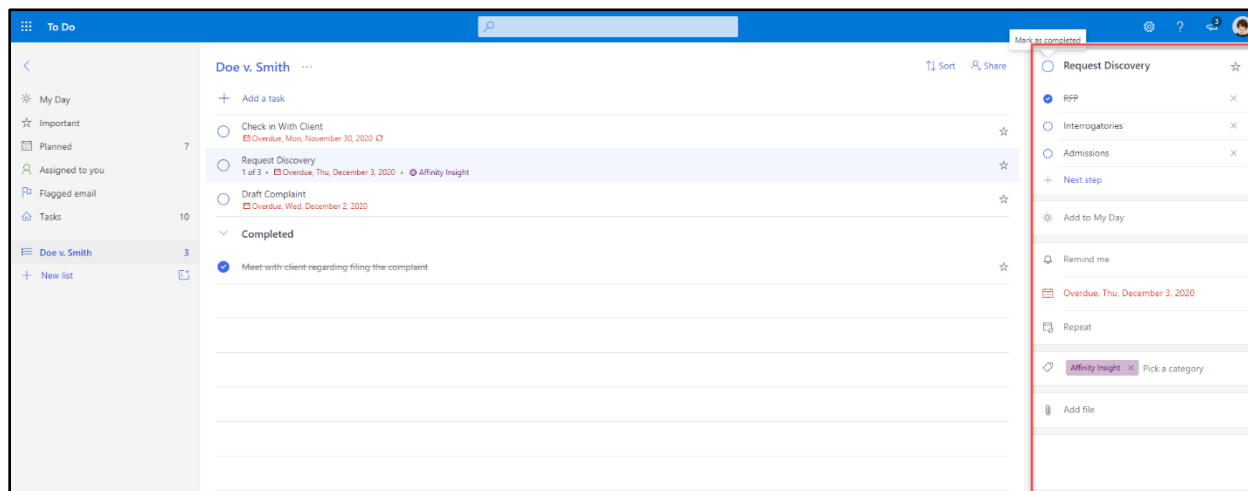


FIGURE 13-3

Sync Between Outlook and To Do

Tasks automatically sync between Outlook and To Do. Tasks added in Outlook will automatically appear in To Do and vice versa. However, not all of the fields and options sync between the two.

What Syncs

The task name, due date, reminder, details, attachments, recurrence, categories, priority/importance, and folder/list sync between Outlook and To Do.

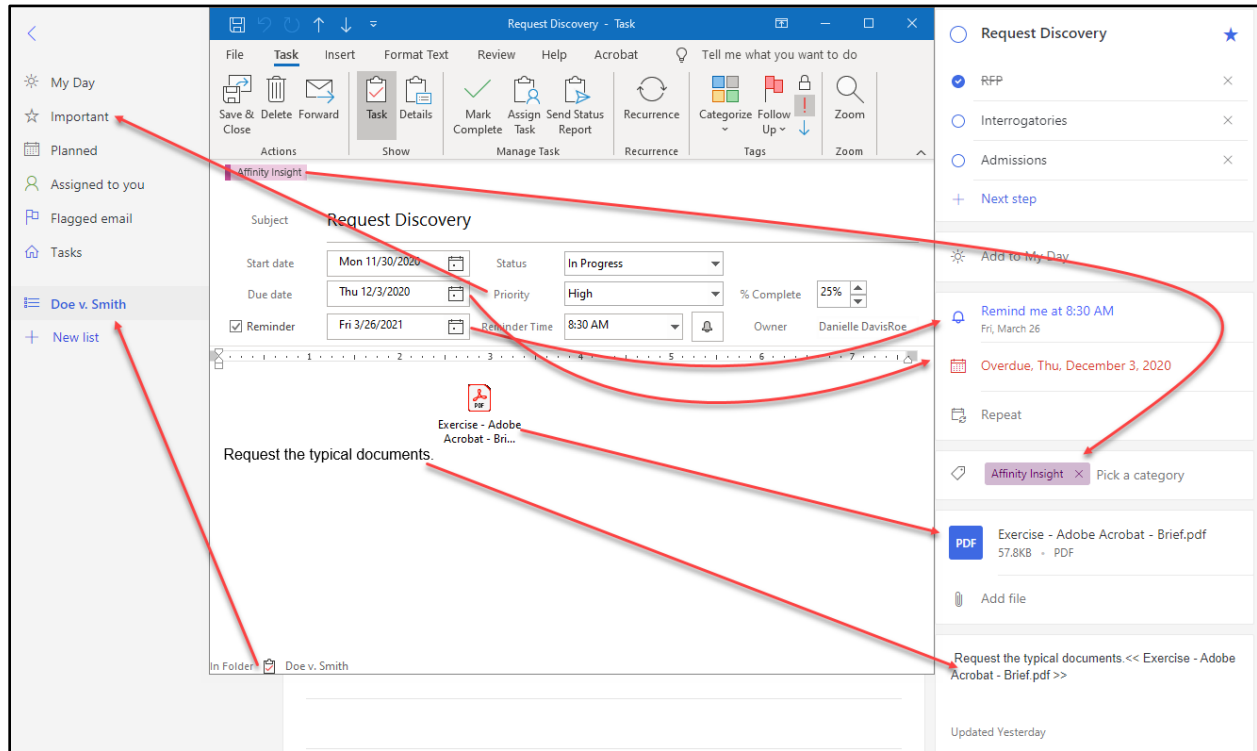


FIGURE 13-4

What Doesn't Sync

Outlook's start date, status, and percent complete do not sync with To Do. To Do's steps do not sync with Outlook.

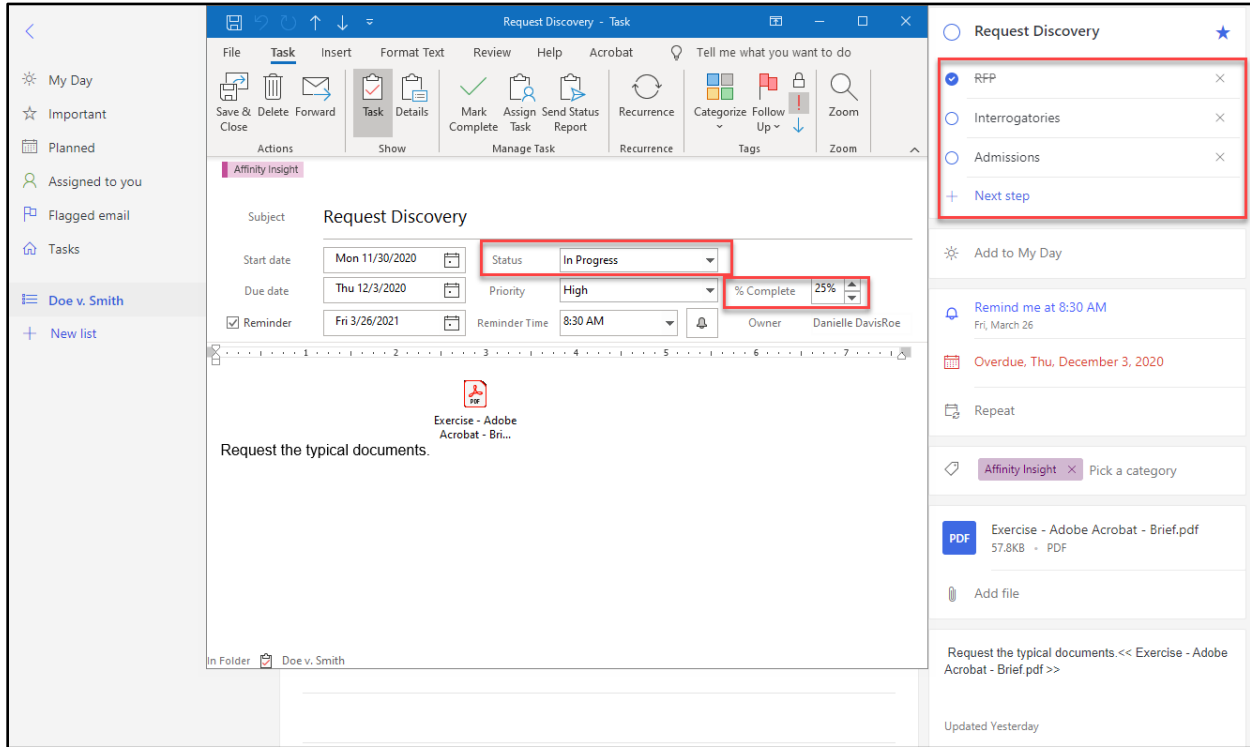


FIGURE 13-5

Right-Click Menu

Right-clicking on a task pulls up a menu that lets you add the task to my day, mark it as important, mark it as complete, set the due date to today or tomorrow, create a new list from the task, move the task, copy the task, or delete the task.

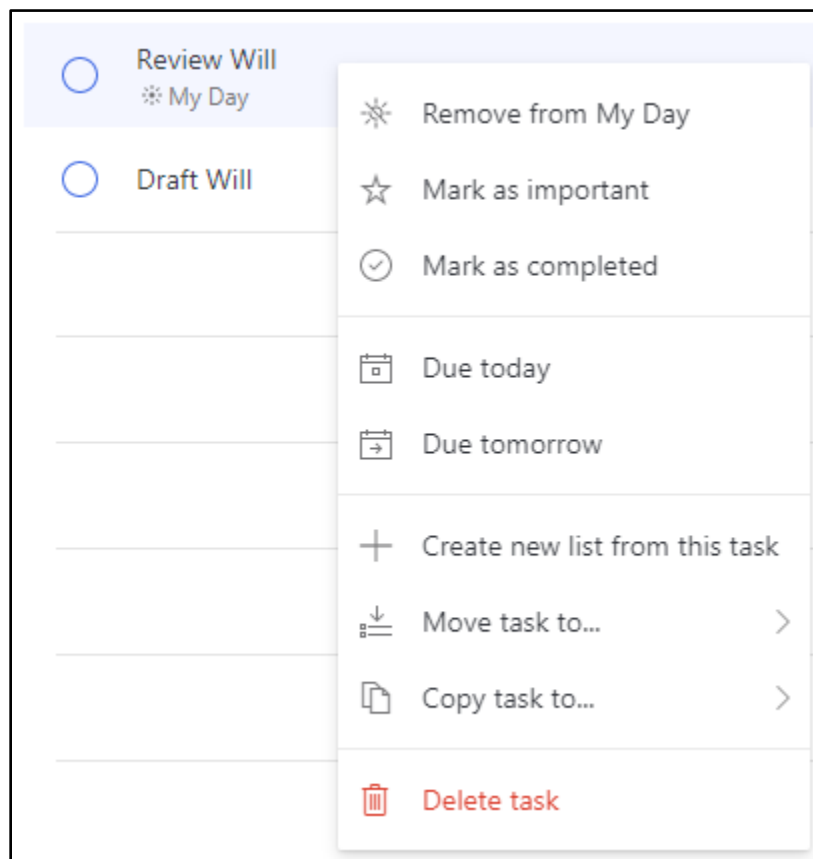


FIGURE 13-6

If nothing happens when you right-click, enable the right-click menu. Click on the **gear icon** in the upper-right corner and open your settings.

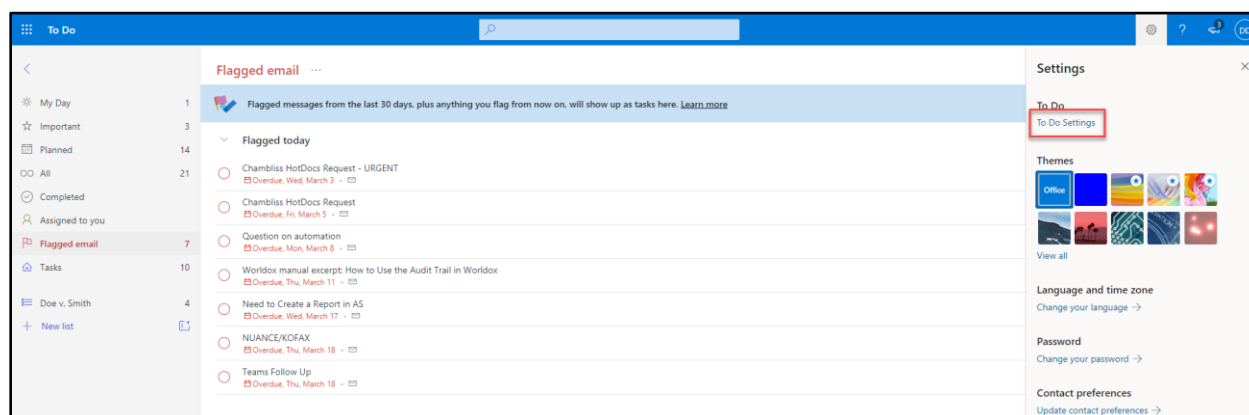


FIGURE 13-7

Under **General**, toggle on **Show right-click menus**.

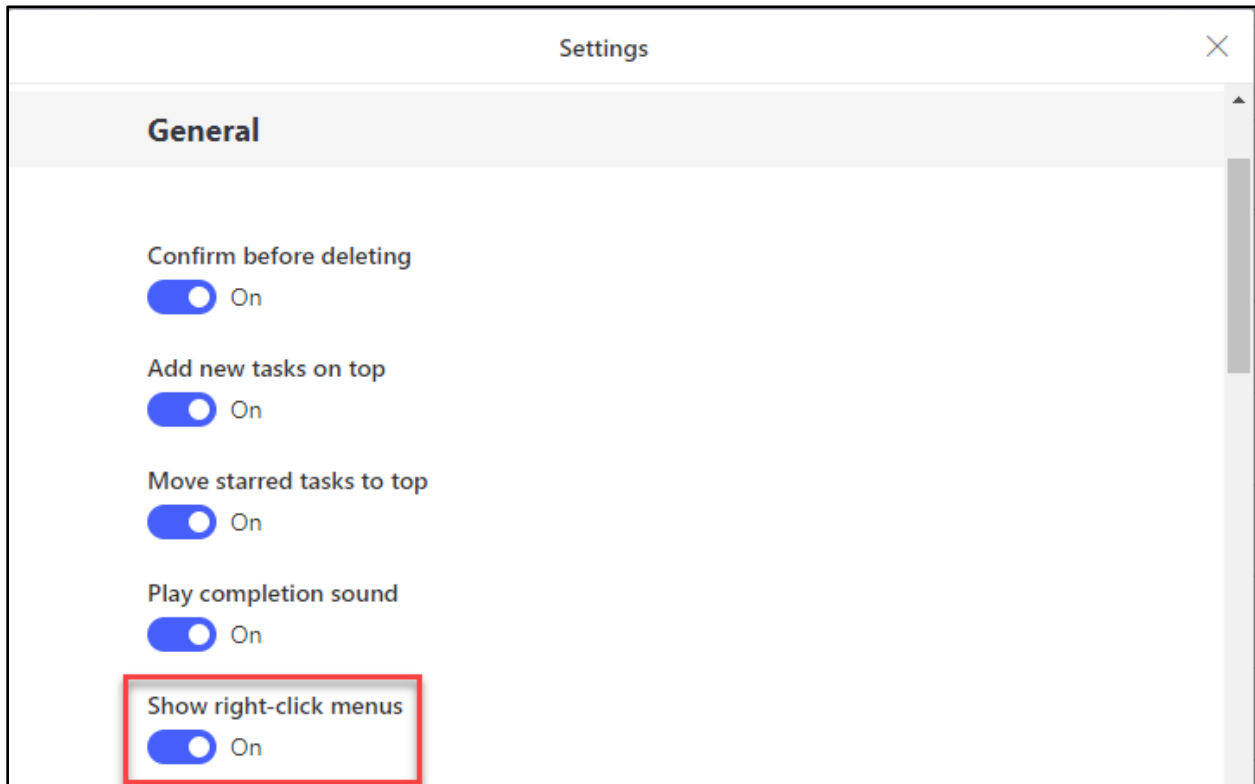


FIGURE 13-8

Smart Lists

If you're unable to all of the smart lists listed below, click on the **gear icon** in the upper-right corner and open your settings.

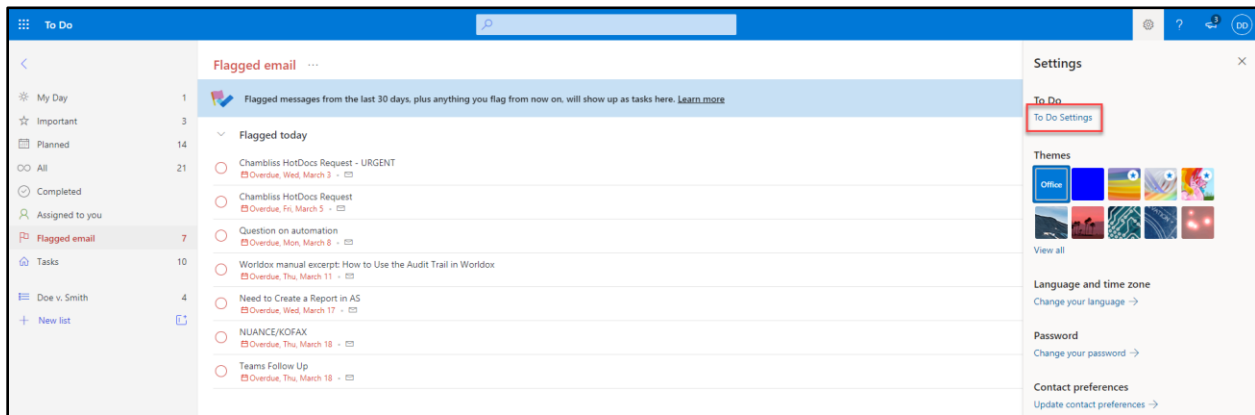


FIGURE 13-9

Toggle on the smart lists you want to see and toggle off **Auto-hide empty smart lists**, if you want to see each list regardless of whether anything is in it (allowing you to drag-and-drop tasks to many of the smart lists).

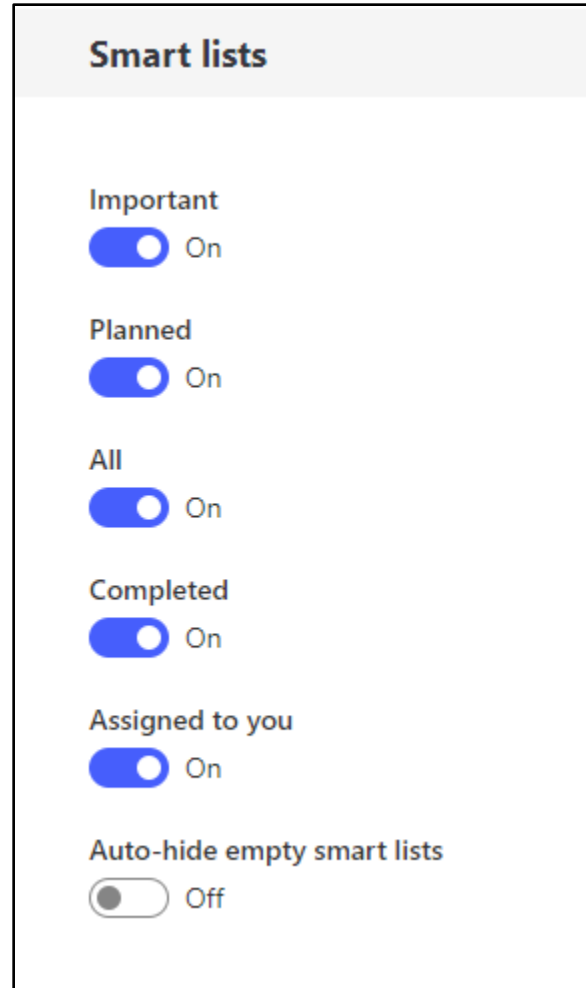


FIGURE 13-10

My Day

My Day resets every day. Start your day by selecting which tasks you want to focus on and adding them to My Day to help you focus on today's priorities. Unfinished tasks remain on the task list, they just disappear from My Day at the beginning of the following day.

To add tasks to My Day, either drag and drop the task onto **My Day** in the navigation pane or click on **Add to My Day** in the task detail pane. You can also right-click on a task and select **Add to My Day**.

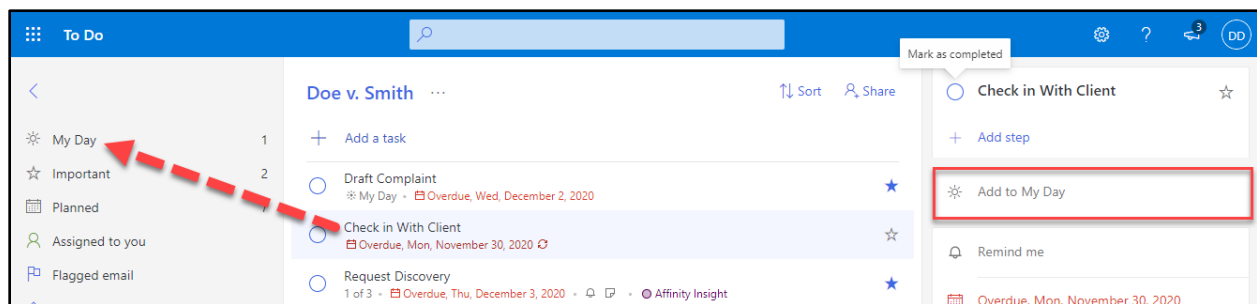


FIGURE 13-11

My Day can be sorted by importance, due date, alphabetically, or creation date by clicking on **Sort**.

Important

Tasks marked as high priority in Outlook show up under **Important** in the To Do navigation pane (as well as under Tasks and a list, if applicable). To add a task to the Important list in To Do, either drag and drop the task onto **Important** in the navigation pane or right-click on the task and select **Mark as important**. You can also click on the **star** to the right of the task.

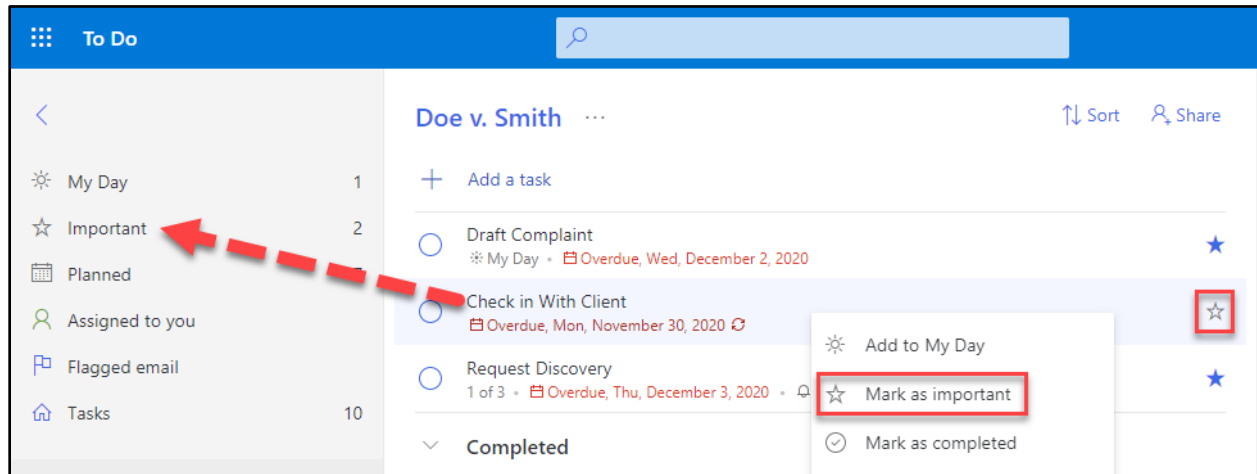


FIGURE 13-12

Planned

Tasks with deadline appear under **Planned** organized by deadline. Overdue tasks appear at the top under **Earlier**. Tasks due today show up under **Today**, tasks due to tomorrow show up under **Tomorrow**, tasks due in the next week (other than ones due today or tomorrow) are under a date range, and everything due further out shows up under **Later**.

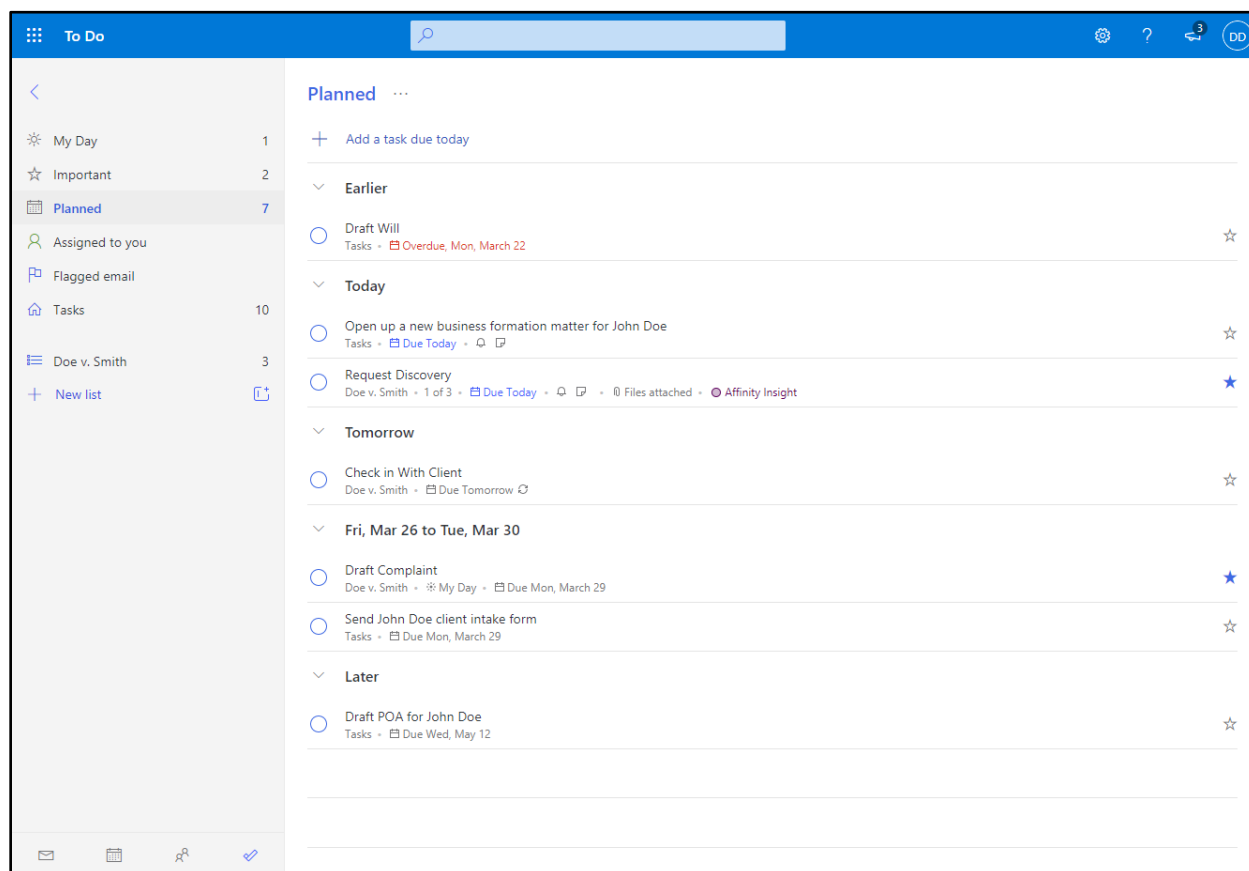


FIGURE 13-13

All

All of your tasks created in Outlook or To Do, tasks assigned to you Microsoft Planner or through a shared list in To Do, and flagged emails show up under **All**, organized by type and list.

Completed

Tasks marked as complete show up under **Completed**, organized by type and list.

Assigned to You

Tasks that are assigned to you in Planner or in a shared task list in To Do, appear in the **Assigned to You** smart list. Tasks delegated to you in Outlook do not show up here - those show up under **Tasks** (see below).

Flagged Email

Emails flagged in Outlook show up under **Flagged email**. Flagged emails can be sorted by importance, due date, added to my day, alphabetically, or creation date by clicking on **Sort**.

Tasks

All Outlook and To Do tasks other than those assigned to by planner or in a shared list, appear under **Tasks**. can be sorted by importance, due date, added to my day, alphabetically, or creation date by clicking on **Sort**.

Lists

Lists allow you to categorize tasks by matter, type of task (ex: business development, active matters, and personal), or team (for shared lists). Tasks on lists also appear in smart lists (as described above).

Creating New Lists

To create a new list, click on **+ New List** at the bottom of the navigation pane, type the name of the list, and hit the enter key on your keyboard.

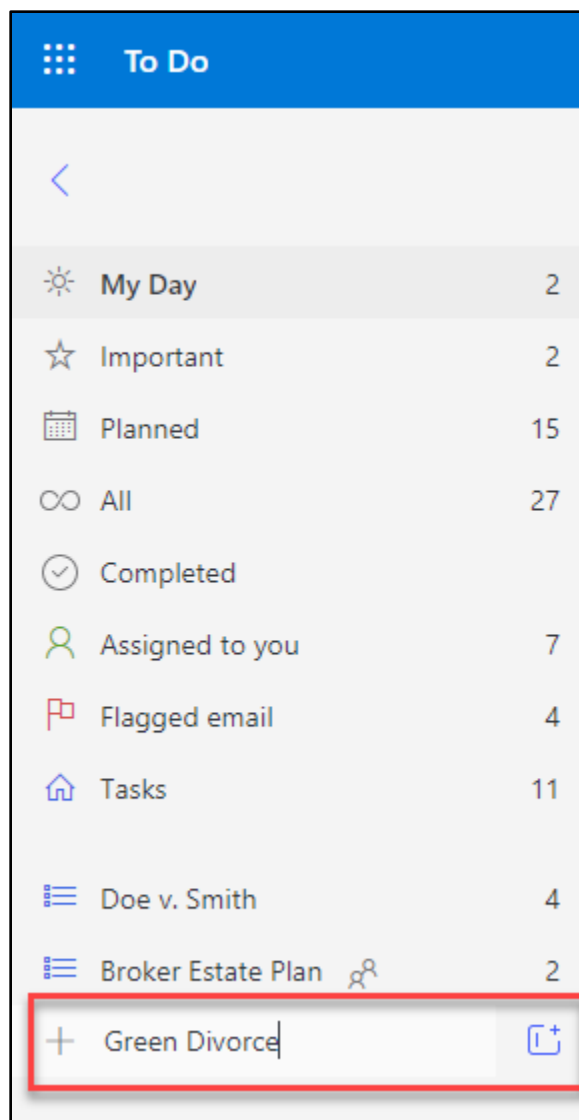


FIGURE 13-14

Sync with Outlook Task Folders

Lists that you create in To Do automatically appear as folders in your Outlook tasks. Folders you create in Outlook tasks automatically appear as lists in To Do.

Shared Lists

Sharing Lists

Lists can be shared with others in your organization, allowing tasks to be delegated through To Do. To share a list:

1. Open the list by clicking on it in the navigation pane.
2. Click on **Share**.

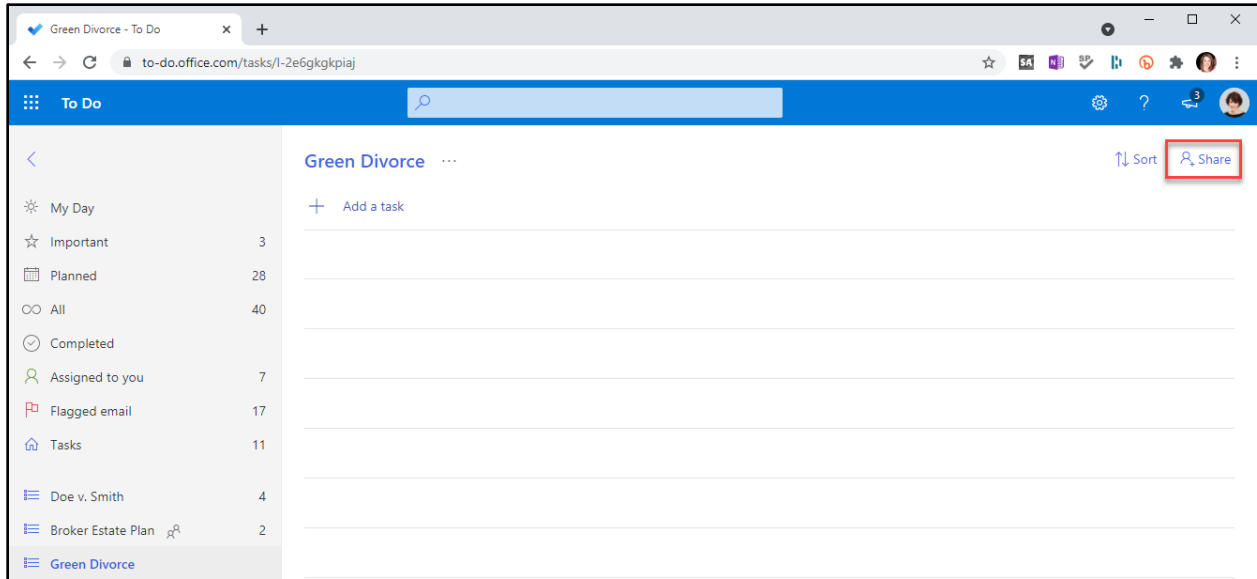


FIGURE 13-15

3. Click on **Create invitation link**.
4. Share the link by inviting people via email or copying the link.

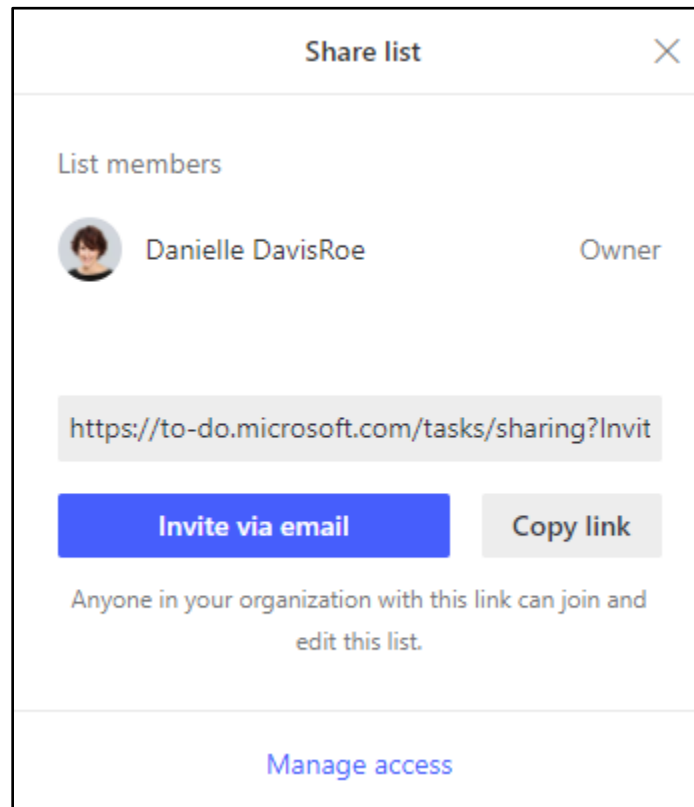


FIGURE 13-16

5. Those who click on the link will be granted access to the shared list.
- Once a list is shared, anyone in your organization with the link can join the list.

Remove List Members

To prevent remove members from the list:

1. Open the list by clicking on it in the navigation pane.
2. Click on the sharing button.

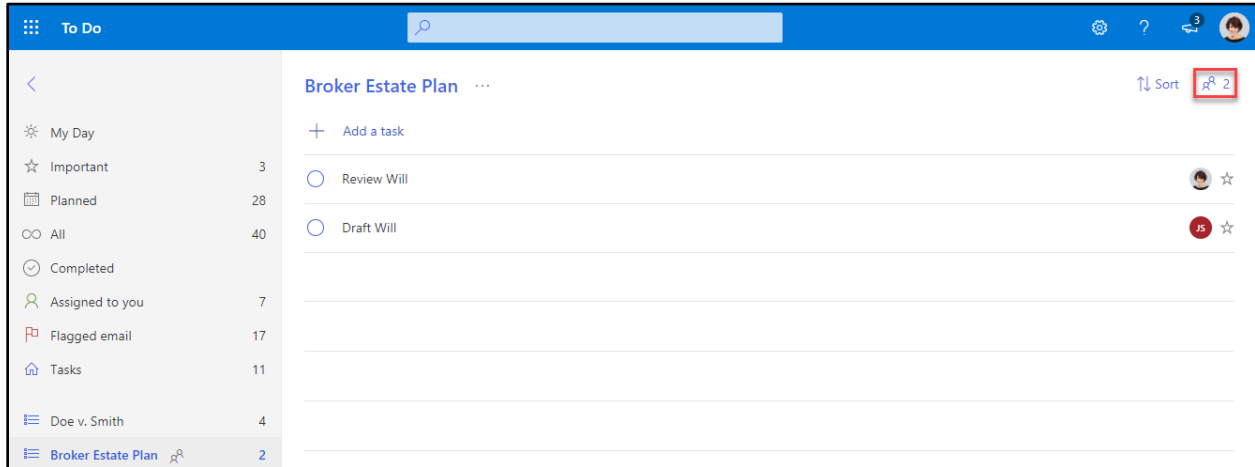


FIGURE 13-17

3. Click on the **x** next to the name of the member to be removed.

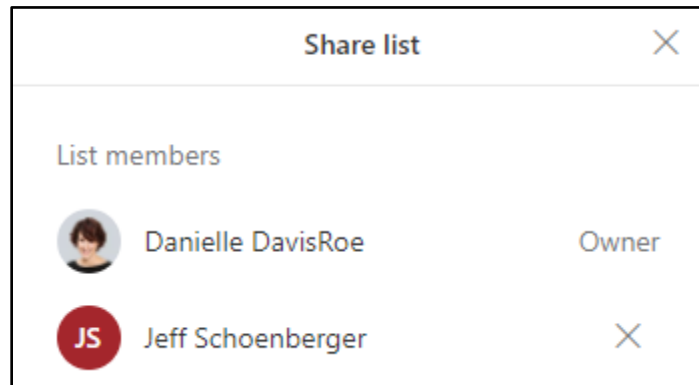


FIGURE 13-18

Prevent New List Members

To prevent additional people from becoming members of a list:

1. Open the list by clicking on it in the navigation pane.
2. Click on the sharing button.

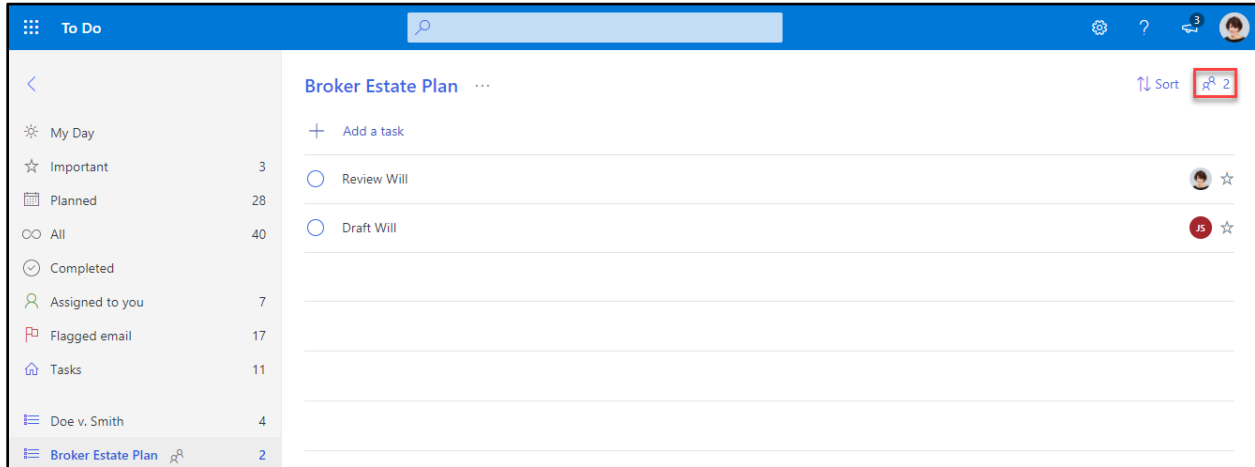


FIGURE 13-19

3. Click on **Manage access**.

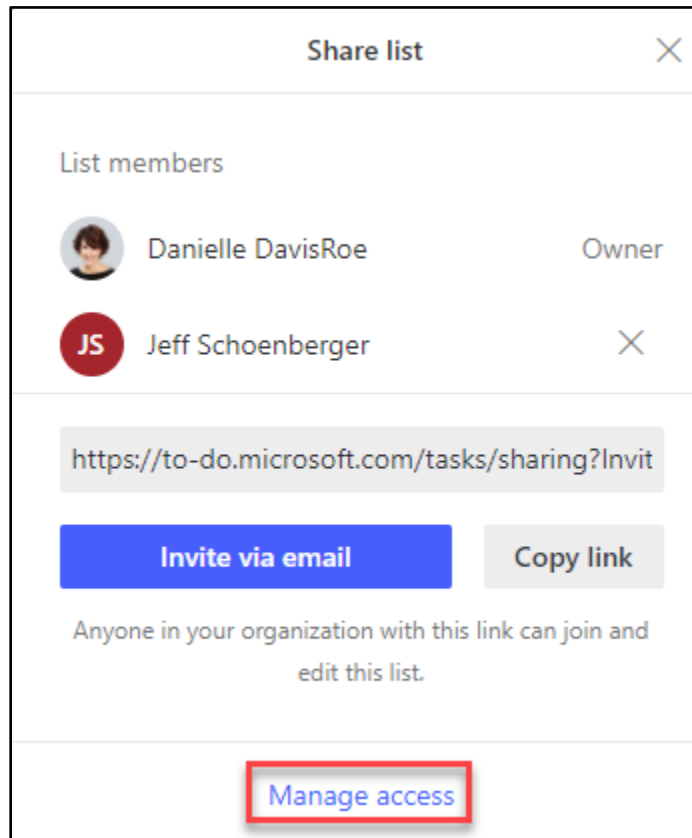


FIGURE 13-20

4. Toggle on **Limit access to current members**.

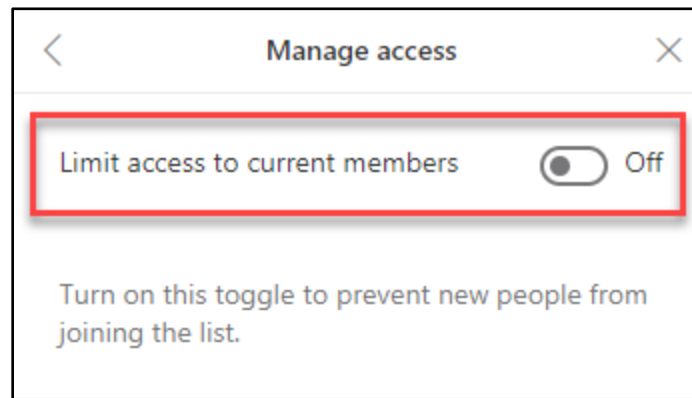


FIGURE 13-21

5. Click **Limit access**.

Stop Sharing

To stop sharing a list altogether:

1. Open the list by clicking on it in the navigation pane.
2. Click on the sharing button.

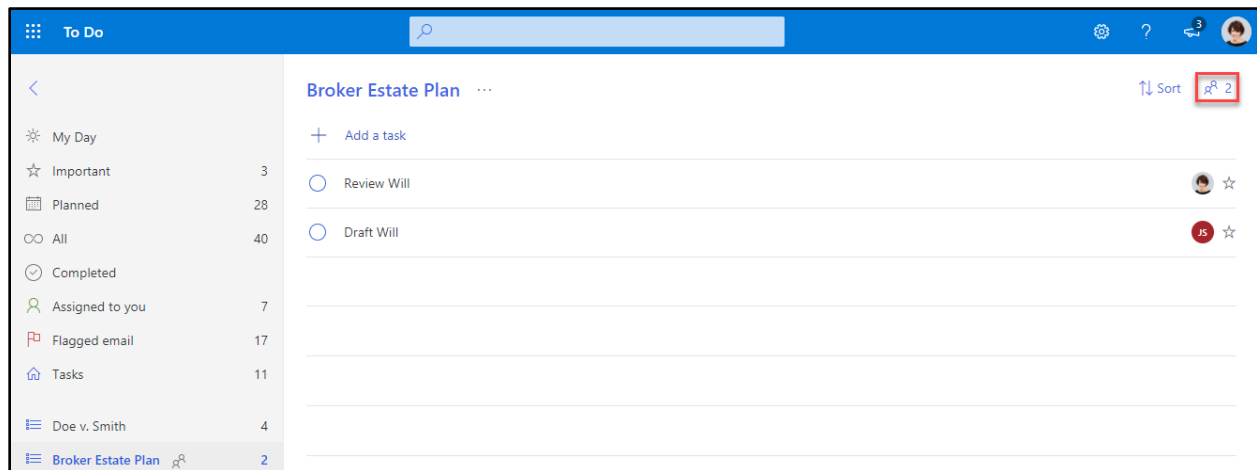


FIGURE 13-22

3. Click on **Manage access**.

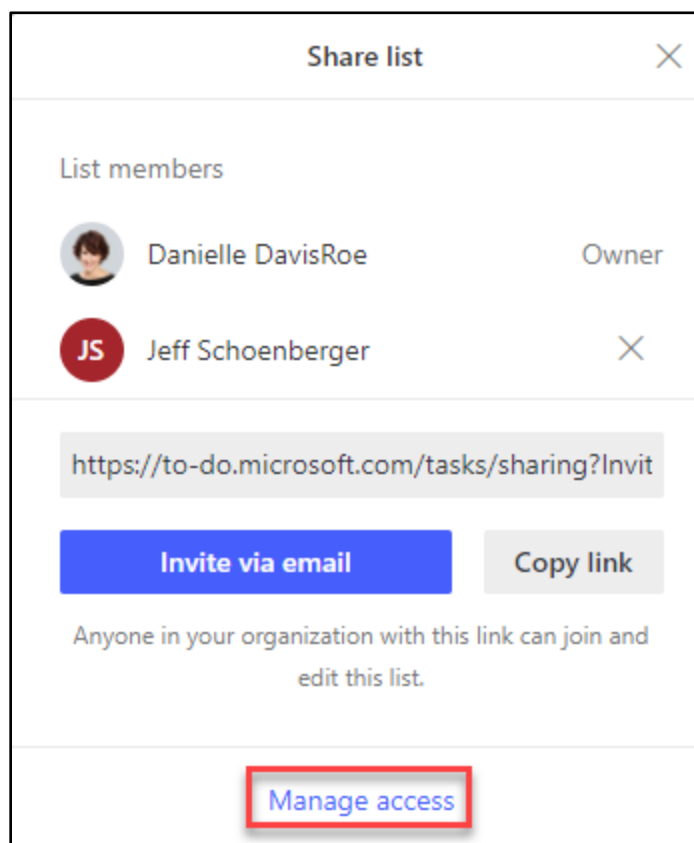


FIGURE 13-23

4. Click on **Stop sharing**.

CHAPTER 14

CATEGORIES

Can't find it? Something missing? Instructions not clear? Email manuals@affinityconsulting.com.

Categories you to color code or tag an appointment, email, contact, or task with a named category which has a color assigned to it. These are particularly helpful with appointments; assigning a category to an appointment turns the entire appointment the color of the category. You can also sort by category which can be useful with email.

Create Categories

Let's say you want to create a category called Billed which you will assign to each appointment on your calendar AFTER it is billed. Just follow these steps:

1. Right-click an appointment you have billed.
2. Choose **Categorize** ➔ **All Categories**.

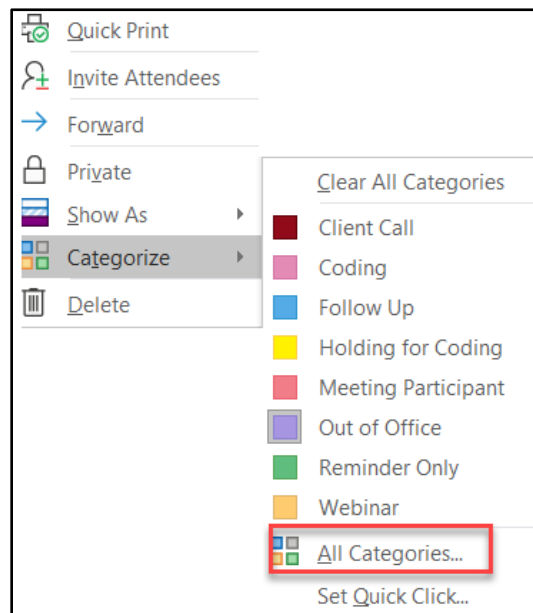


FIGURE 14-1

3. Click the **New... button** and create a category as follows:

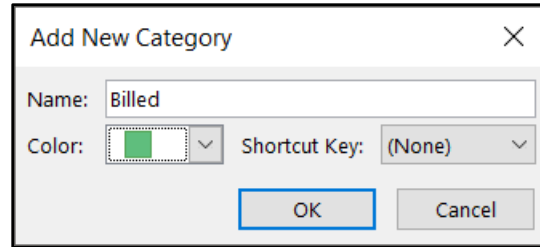


FIGURE 14-2

4. Click **OK** ➔ **OK**.

Apply Categories

Right-click on an item. Under categorize, select the desired category. You can apply more than one category. If more than one category is applied to an appointment, the additional colors will be shown as small boxes.

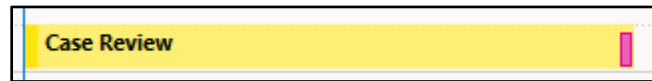


FIGURE 14-3

CHAPTER 15

SEARCHING

Can't find it? Something missing? Instructions not clear? Email manuals@affinityconsulting.com.

Quick Search

In Outlook 2013/16 At the top of each mail folder, you'll see a box like the one below:



FIGURE 15-1

In 2019/21/365, you'll see a search bar at the top of the application.



FIGURE 15-2

This will search for words you type in the email address or body of any email contained in that folder.

The Search contextual tab will also appear, providing additional options.

Advanced Search Capability

Advanced search gives you a tremendous number of options for searching through Outlook. Hit **Ctrl + Shift + F**.

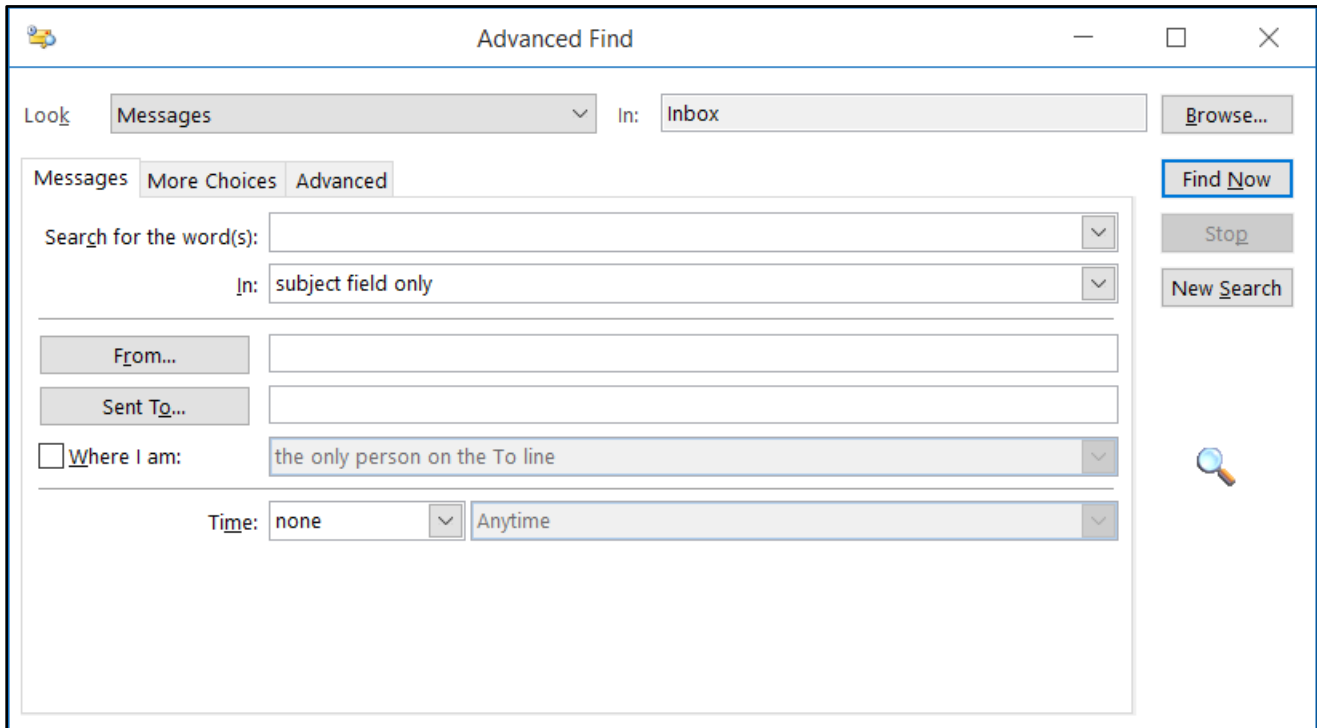


FIGURE 15-3

Search Folders for Repetitive Searches

Use search folders to reuse the same search over and over.

Creating Search Folders

To create a search folder:

1. On the **Folder ribbon**, click on the **New Search Folder button**.
2. Under **Custom**, select **Create a custom Search Folder**.
3. Click on the **Choose... button**.
4. Name the Search Folder.
5. Click on the **Criteria... button** to set up the search.

Using Search Folders

Search folders appear in the **Folder Pane**, on the left-hand side. Click on the folder name to repeat the search.

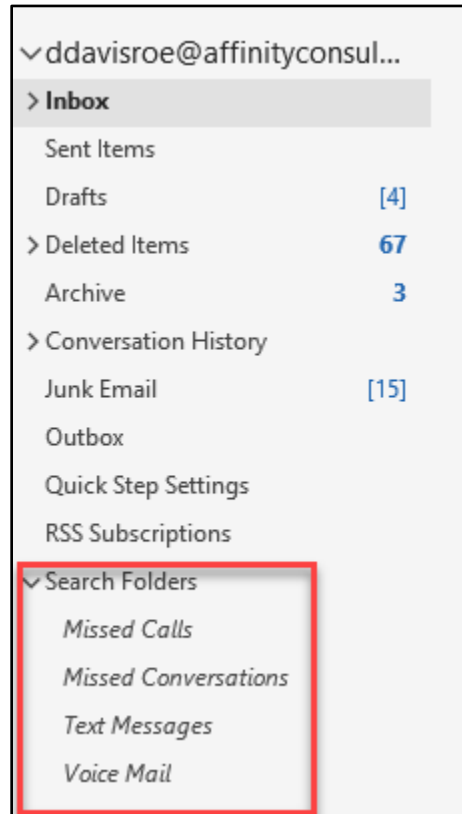


FIGURE 15-4

Editing Search Folders

To edit a search folder:

1. In the **Folder Pane**, right-click on the name of the folder.
2. Click on **Customize This Search Folder...**

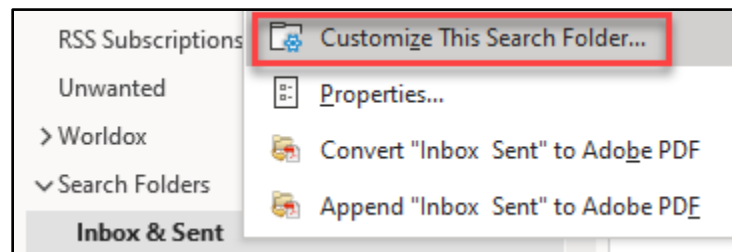


FIGURE 15-5



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TAB 6

17th Solo and Small Firm Conference: Secrets for Success

Yes, You Really do Belong - Managing the Imposter Syndrome in Your Life and Practice

Doron Gold

Doron J. Gold, Psychotherapy and Wellness Education

June 8, 2023



Definition of Imposter Syndrome: Struggling with the sense that you haven't earned what you've achieved and are a fraud (Bravata, D. M., et al., Journal of General Internal Medicine, Vol. 35, No. 4, 2020).

Tips for Managing Imposter Syndrome:

1. Keep a subfolder on your desktop or in your email, of clients, colleagues, etc. praising, thanking or offering positive feedback of any kind. Sometimes, when we're most insecure, we need reminders of our competence and impact.
2. Learn the facts: One of the best ways to manage feeling like an impostor is to address the cognitive distortions contributing to those feelings. Remind yourself of times that you've achieved positive outcomes for clients, or been asked to speak on your area of practice. Acknowledge to yourself the evidence that you do know what you're doing.
3. Pay attention to the conversation in your head. Ask yourself how you would support a friend who minimizes their accomplishments and then apply the same supportive language to your own story.
4. Perfectionism fosters feelings of inadequacy. Feeling like no matter how much you do, it's not enough, and that others do more, leaves one perpetually unsatisfied and insecure. Instead of pursuing perfection, pursue excellence...and self-compassion.
5. Seek out mentors with a different experience & perspective from you. Be proactive in connecting with them and share openly and transparently. It is ok to ask for the time you need as a mentee, even as a junior.
6. Boundaries to keep out toxicity. Say 'no'. If you have guilt, choose over your feelings of obligation. This includes ending relationships that are too much work, where you're treated poorly, even if it's with clients, colleagues or even mentors.
7. Hearing or reading about prominent, successful people who speak openly about their own Imposter Syndrome, like Albert Einstein, Justice Michael Moldaver, Neil Armstrong, or Maya Angelou.
8. Sometimes, the system is designed to keep you feeling inadequate. It's not you. This is particularly so for equity seeking groups (BIPOC, women, LGBTQ+, religious groups, etc.).
9. Deliberate positive self-talk and self-affirmation to counteract the impact of self-doubt and negative self-talk.
10. Catching yourself comparing yourself to others. We may think that we can measure how we're doing by how we perceive others are doing but, a) We have no idea how others are actually doing, and b) Your journey is incomparable to anyone else's journey. Comparison is the thief of joy.

Resource provided by:

Doron J. Gold, BA, JD, MSW, CPCC - Psychotherapy and Wellness Education

Email: thelawyertherapist@gmail.com

Imposter Syndrome Resources

Doron Gold

Doron J. Gold, Psychotherapy and Wellness Education

Visram, Yasmin, (LEAP) When Implicit Bias Amplifies Imposter Syndrome (LEAP)
<https://www.oba.org/JUST/The-Community/2020/May-2020/When-Implicit-Bias-Amplifies-Imposter-Syndrome>

Tulshyan, Ruchika and Burey, Jodi-Ann, (HARVARD BUSINESS REVIEW) Stop Telling Women They Have Imposter Syndrome
<https://hbr.org/2021/02/stop-telling-women-they-have-imposter-syndrome>

Jamison, Leslie, (THE NEW YORKER) Why Everyone Feels Like They're Faking It
<https://www.newyorker.com/magazine/2023/02/13/the-dubious-rise-of-impostor-syndrome>

Cuddy, A. J. C. (2015). Presence: bringing your boldest self to your biggest challenges.



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TAB 7

17th Solo and Small Firm Conference: Secrets for Success

Succession Planning for All Stages of Your Career

Colleen Peffers

PeffersLaw

Kim Mackay, Trustee Services

Law Society of Ontario

June 8, 2023



Fact Scenario

Colleen Peffers, PeffersLaw

I am a _____ (enter practice type). I employ 2 staff members. My partner does not work outside the home as they are taking care of our two children, one with special needs. Unfortunately, I was in a motor vehicle accident and now I'm stuck in the hospital with a broken pelvis, recovering from being in an induced coma for three (3) days following the crash, and I'm still taking some really heavy-duty pain medication. I have a _____ (settlement conference/real estate deal) to attend on Monday. Payroll for my staff and myself is due on Friday and I'm the only one who can process those payroll amounts. Payroll Taxes and our HST is due to be paid on Tuesday. I also found out that we have received settlement funds for a small claims court matter into the firm's trust account. What I can remember about that matter (the narcotics are really impairing my ability to focus) is that we only have five (5) days to disburse those funds.

My long-time clerk, Jennifer, has been answering the phones and trying to keep on top of my emails, but as you know a lawyer can get more than 100 emails a day. Some from clients, some from other counsel, some from other third parties, real estate agents, mortgage brokers. You know the daily inflow of "stuff" that we have to deal with every day.

So, what happens next, while I'm recovering from my broken pelvis and my "foggy" brain from all the medications I've been taking.

If I've drafted a POA for me, as a person, then the person I have appointed will be able to manage "my" stuff. Pay the mortgage, withdraw funds from my personal bank, buy the groceries for my partner and my children. I'm all set, right?

Not so fast. Who is going to take care of my responsibility in my practice? If I haven't drafted a POA for my practice, what happens (Kimberly Mackay is going to speak to that shortly)

I need a POA for my practice, whether I'm incorporated as a Professional Corporation or a sole proprietorship. The person I appoint **must** be a lawyer in good standing with the LSO. Why does the attorney have to be a lawyer?? Well – they can give instructions to my staff, Jennifer, and step into my shoes when I'm not able to do that.

How are those settlement funds going to be released from my trust account? Jennifer should not have access to sign trust cheques. But my attorney would be able to take care of those settlement funds. Jennifer can't take instructions from an opposing lawyer to release an original Certificate of Appointment (because that trustee has died and the next in line needs it), but an attorney, for my practice, would be able to take care of instructing Jennifer to release that original certificate. Jennifer can't sign the Transfer for completeness, but my attorney could do that for my client's real estate closing. I can pretty much guarantee that the lawyer acting on the other side of that real estate deal is not going to be able to get instructions from their client to postpone the deal because of my accident.

How will my partner and children survive when I'm not cutting myself a payroll cheque this week? Maybe Jennifer has access to process payroll, but that can be dangerous. We all want to think that the staff we hire will be loyal and honest, but sometimes the temptation of doing things that aren't perfectly above-board is too tempting. That's why your attorney is so important to ensure that your practice, your family, your clients, you're your interactions with opposing counsel continue to run as smoothly as possible while I concentrate on getting well.

What happens if it's the unthinkable, and I died in that car accident? I drafted a Will and my partner is going to sort everything out right? Not so fast.....My partner is not a lawyer and my Will doesn't specifically address my practice assets....so what happens to my practice, my staff, my clients, all those people my practice is responsible to and for? Well, Jennifer is calling Kimberly at LSO Trustee Services to figure out what to do....Be mindful that if I don't address my practice, whatever value it may have could be distributed to people, if I were to have a say, I don't want those funds to go to.

How do I (or us as a group of lawyers) avoid adding Kimberly's burden....draft a Second Will that specifically addresses my practice assets. The Estate Trustee, who is a lawyer in good standing with the LSO, will have the responsibility of running my practice for windup and/or sale, and then distribute the residue (what's left after taxes, liabilities, expenses) to the beneficiaries in named in the Second Will. My Estate Trustee will give Jennifer instructions to deal with clients, other lawyers, third parties.

Survey

Colleen Peffers, *PeffersLaw*

I am a (gender) _____

I am a sole practitioner Y/N

I have incorporated my practice (professional corporation) Y/N

I am employed by my Practice Y/N

I am a litigator Y/N

I am a solicitor Y/N

I have a blended litigation/drafting Practice Y/N

I am a (son/ daughter)

I am (marital status)

I have a loved one in receipt of ODSP

I have a trust account for my Practice

I have a general account for my Practice

I have a dog/cat/bird/snake named _____(insert pet here)

I have employees in my Practice Y/N

I have contractors in my Practice Y/N

I have an HST number for my Practice

I have a Payroll Tax number for my Practice

I own/lease a car

I own/rent my home

I have registered investments (RRSPs/RRIFs)

I have _____ children

I have an RESP for my _____ children

I have an equipment lease for my Practice Y/N

I own the “stuff” in my home Y/N

I own the “stuff” in my Practice Y/N

I have loaned my Practice money Y/N

I collect _____ (insert baseball cards/stamps/enamel ware/cars)

Succession Planning & the Law Society

Kim Mackay
Senior Counsel & Team Manager

Trustee Services
130 Queen Street West
Toronto, ON M5G 1E6
416-947-3366
Trustee_Services@lso.ca



The Law Society & Role of Trustee Services:

When do we get involved?

- Licensee is no longer attending to their practice
- Risk Assessment - Client Property/Interests at Risk
- Illness/Incapacity
- Death
- Abandonment
- Suspension/Revocation

Levels of Involvement:

- **WHY?** Required to protect client interests
- files, funds, confidentiality
- **HOW?** Court appointment as trustee *or* voluntary
Authorization & Direction
- Authority found in Sections 49.44 to 49.52 of the *Law Society Act*
- **WHAT?** Information – Consulting Services - Support/advice
& guidance/assistance
- **WHO?** Advice to Retiring Licensees / Staff / Estate Trustee/
Family / Colleagues

2021 stats:

Trustee Services helped 140 licensees and their families with practice wind up

14 Trusteeship Orders issued

Inventory - staff maintained 119 active administrations, 47 trusteeships

3243 public/licensee inquiries

Best Practices:

- Create a Will and Power of Attorney naming a Licensee as Trustee/Attorney of Law Practice
- Discuss with bank their requirements re signatories and transfer of accounts - every bank is different!
- “Buddy System” - discuss (and document) the transfer (or coverage) of files/funds with a colleague.
- Maintain current contact and file lists, diaries and financial/client account records, secure passwords to banking and computers, etc.
- Access tools on LSO website: [contingency-planning-for-lawyers](#)

WHY?

- Relieves family of burden and cost
- Preserves value of the practice and your reputation
- Protects clients' interests and property
- Relieves the cost to the profession
- It's the right thing to do....What is your legacy?



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TAB 8

17th Solo and Small Firm Conference: Secrets for Success

Tech Update for Legal Professionals in 2023

Catherine Sanders Reach

North Carolina Bar Association

Paul Unger

Affinity Consulting Group

June 8, 2023





TECH UPDATE FOR LEGAL PROFESSIONALS IN 2023

17th Solo and Small Firm Conference: Secrets for
Success – Law Society of Ontario

Catherine Sanders Reach & Paul J. Unger

For Further Reading:

Artificial Intelligence

Artificial Intelligence in Practice video youtu.be/rc1hcgvuFM0 The slides [are here](#)

Resources to Keep Up with AI (News, Legal News, and Tools)

- The Rundown - <https://www.therundown.ai/>
- Prompt Engineering Daily - www.neatprompts.com/subscribe
- Legaltech News | Newsletters - www.law.com/legaltechnews
- LawSites - <https://www.lawnext.com/>
- Ride the Lightning - senseient.com/ride-the-lightning

Articles

- [AI Tools in MS 365 in Advance of the CoPilot Launch - North Carolina Bar Association \(ncbar.org\)](#)
- [The AI Genie Isn't Going Back in The Bottle](#)
- [Will ChatGPT Replace Ediscovery Review Teams](#)
- [EDiscovery Buyers Guide – AI Tools](#)
- [5 Types of AI Tools For Lawyers That Can Supercharge Your Practice](#)
- [Bing Chat and Bard: The Basics of AI Chat Search Engines](#)

Tools We Demonstrated/Discussed *** *Note: Most of these are in public BETA or prerelease*

Legal Tools

- [Docket Alarm – docket search and analytics](#)
- [Casetext CoCounsel – legal research assistant](#)
- [LawDroid CoPilot – AI assistance for documents and client chat](#)
- [Spellbook – contract drafting](#)

Search, Content Generation, Image Generation

- [ChatGPT – Generative AI](#)
- [Google's Bard – Generative AI/Search](#)
- [Bing AI - Generative AI/Search](#)

AI for Your Own Data

- [Josef Q - AI for your own policies and regulations](#)

- [Microsoft 365 Copilot – AI for Microsoft 365](#)
- [Channel – query your own databases](#)
- [My AskAI - Your own ChatGPT, with your content](#)
- [Kaya.chat – your personal AI](#)

Marketing

- [Copy.ai – AI blog posts](#)
- [Gamma – AI presentation, document, webpage creation](#)
- [Blog Title Generator - SEO Blog Title Ideas](#)
- [Stunning – Build webpages with AI](#)
- [Microsoft Designer](#)

Meetings

- [Tactiq – virtual meeting transcription with AI notes and summaries](#)
- [OtterPilot - AI Meeting Assistant](#)

Microsoft and Other Tools

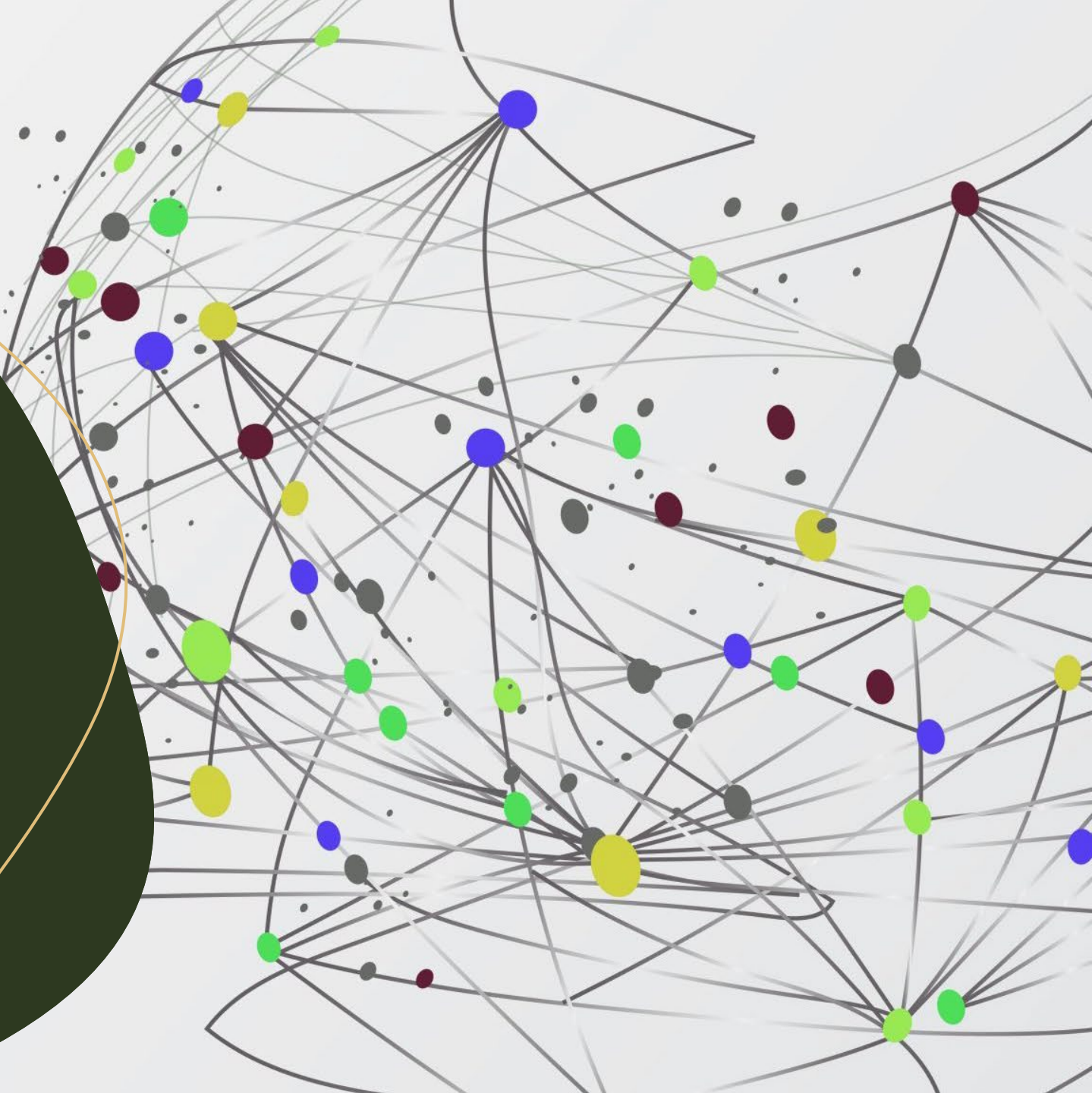
- [3 Little Marketing Hacks for Law Firms - North Carolina Bar Association](#)
- [What To Expect from The New MS Outlook - North Carolina Bar Association](#)
- [New Features in MS Word for 365 Subscribers - North Carolina Bar Association](#)
- [New\(er\) Collaboration Tools in MS Outlook/365 - North Carolina Bar Association](#)
- [Outlook Life Savers - North Carolina Bar Association](#)
- [Three Personal Knowledge Management Tips for MS 365 Subscribers - North Carolina Bar Association](#)
- [Quick Parts: The Good, the Bad, and the Alternative - North Carolina Bar Association](#)
- [Are There Alternatives to Email? - North Carolina Bar Association](#)
- [SimplyFile Add-on for MS Outlook - North Carolina Bar Association](#)
- [How to Use Microsoft Teams Channels - North Carolina Bar Association](#)
- [Microsoft OneDrive Explained - North Carolina Bar Association](#)
- [Lists in Microsoft 365 - North Carolina Bar Association](#)
- [The Power of Speech: Voice Options in MS Word - North Carolina Bar Association](#)
- [Microsoft 365 Power Automate - North Carolina Bar Association](#)
- [Microsoft 365 and MS Office Resources - North Carolina Bar Association \(ncbar.org\)](#)

Security

- [Early Spring Cleaning for Your Technology - North Carolina Bar Association](#)
- [Redux: Is a Password Enough to Keep Your Sensitive Information Safe? - North Carolina Bar Association](#)
- [Lessons from the LastPass Breach - North Carolina Bar Association](#)
- [Testing and Training for Cybersecurity in Law Firms - North Carolina Bar Association](#)
- [A Tale of Two Templates - North Carolina Bar Association](#)
- [The Cost of Not Upgrading Technology - North Carolina Bar Association](#)

Tech Update for Legal Professionals in 2023

Paul J. Unger, Affinity Consulting Group
Catherine Sanders Reach, NCBA Center
for Practice Management

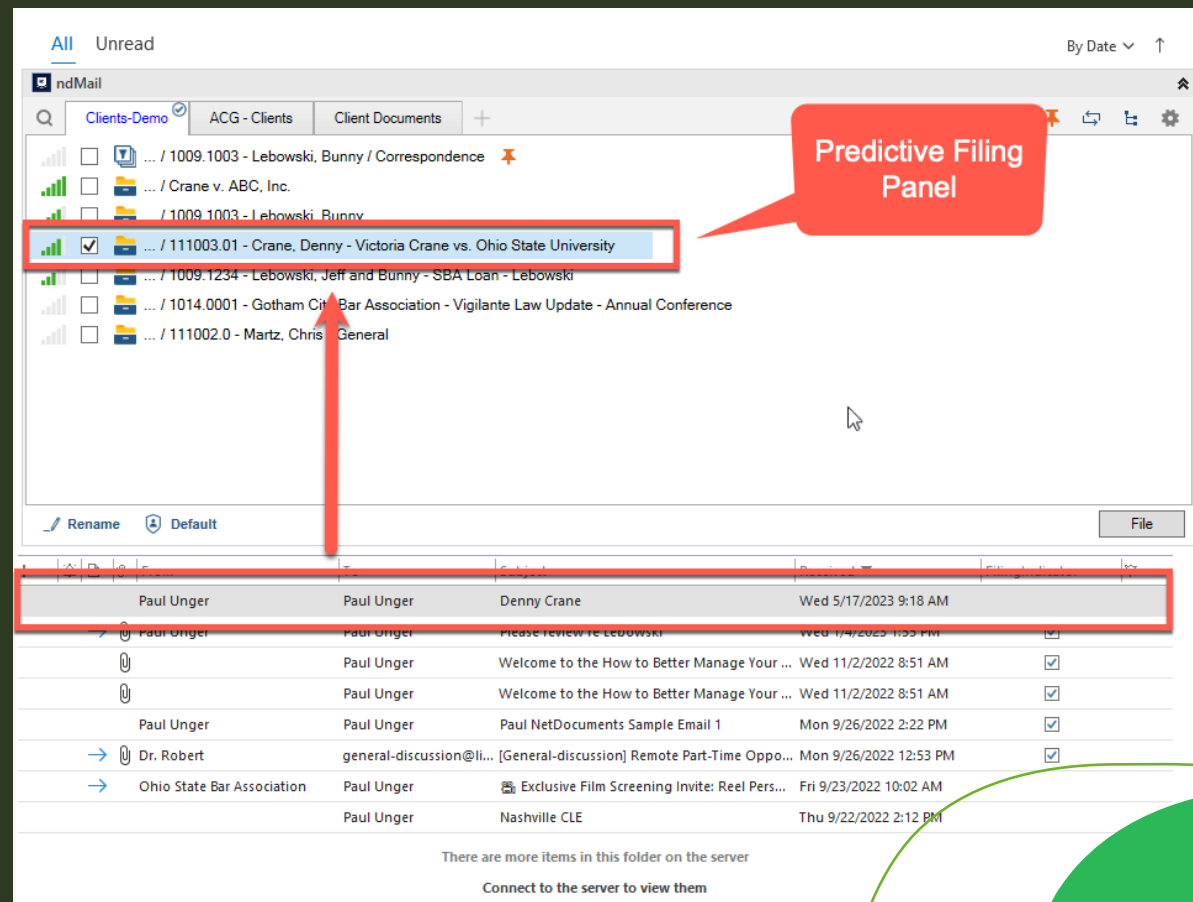


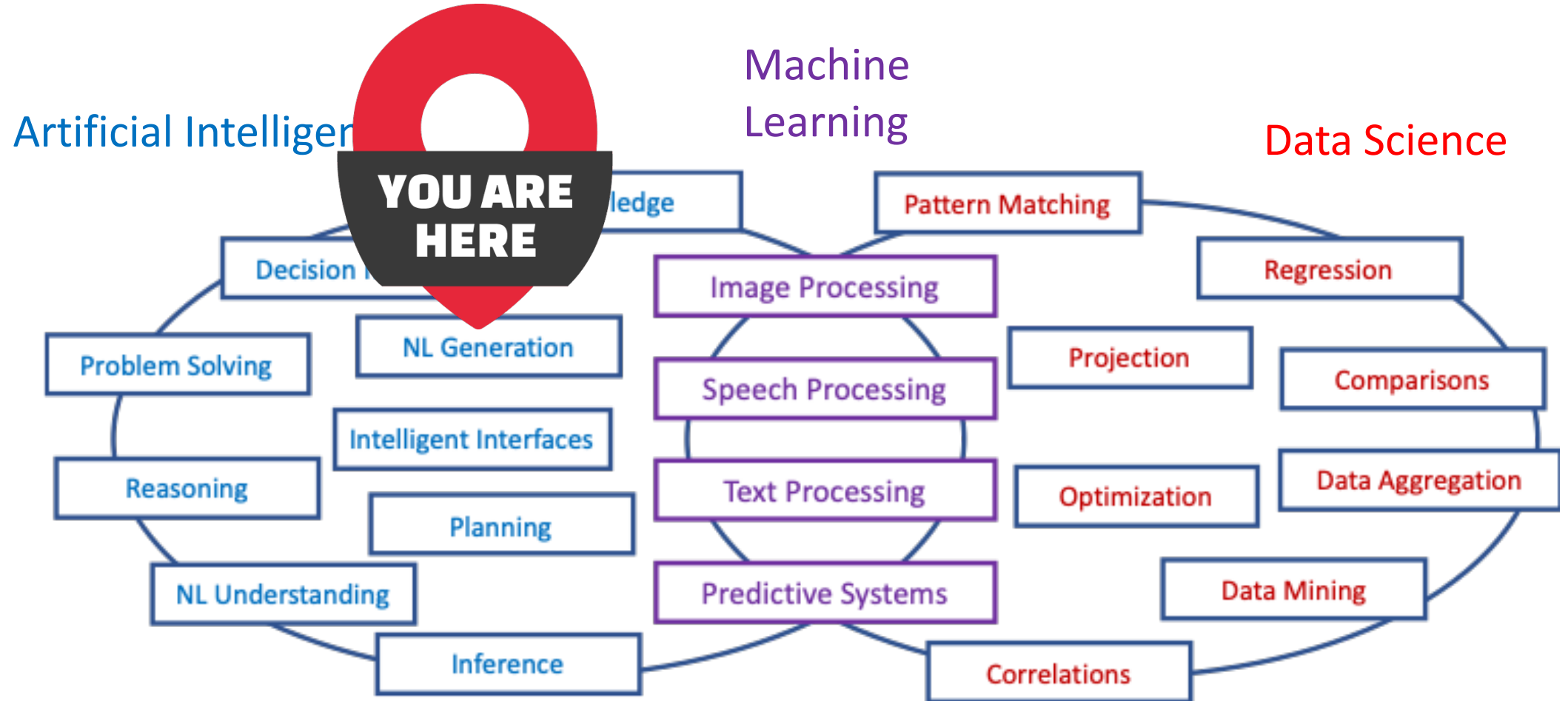


Artificial Intelligence

AI in ndMail (NetDocuments)

Evaluates content, attachments, your & other team members filing behavior, sender, recipients to achieve 1-click filing





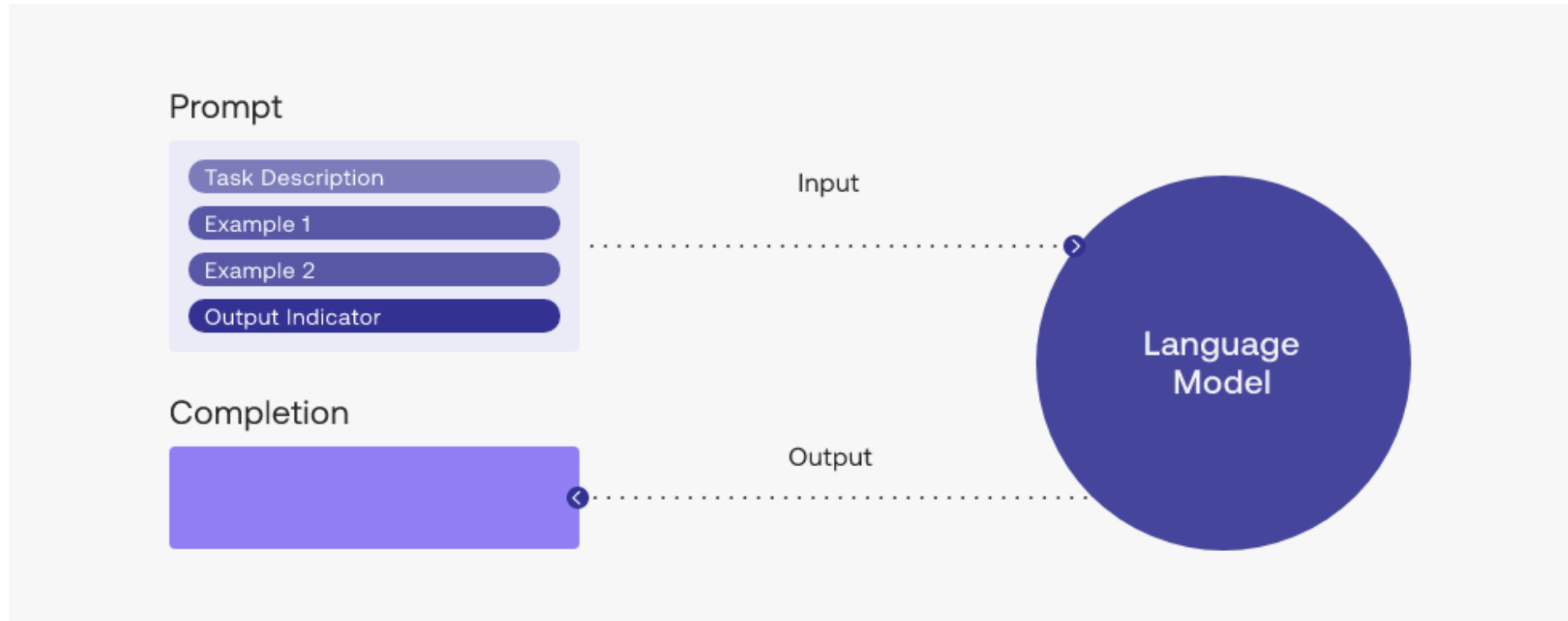
Intersection of AI and Data Science

Source: Artificial Intelligence at Northwestern: A View from Computer Science,
<https://www.mccormick.northwestern.edu/news/articles/2019/05/artificial-intelligence-at-northwestern.html>



BETA

New AI Skill to Develop: Prompt Engineering



New AI Skill to Develop: Prompt Engineering

ChatGPT is Creating Jobs That Pay As Much as \$335,000


By [Aasil Ahmed](#) | Published Apr 17, 2023 | 2:09 pm



AI for Content Creation

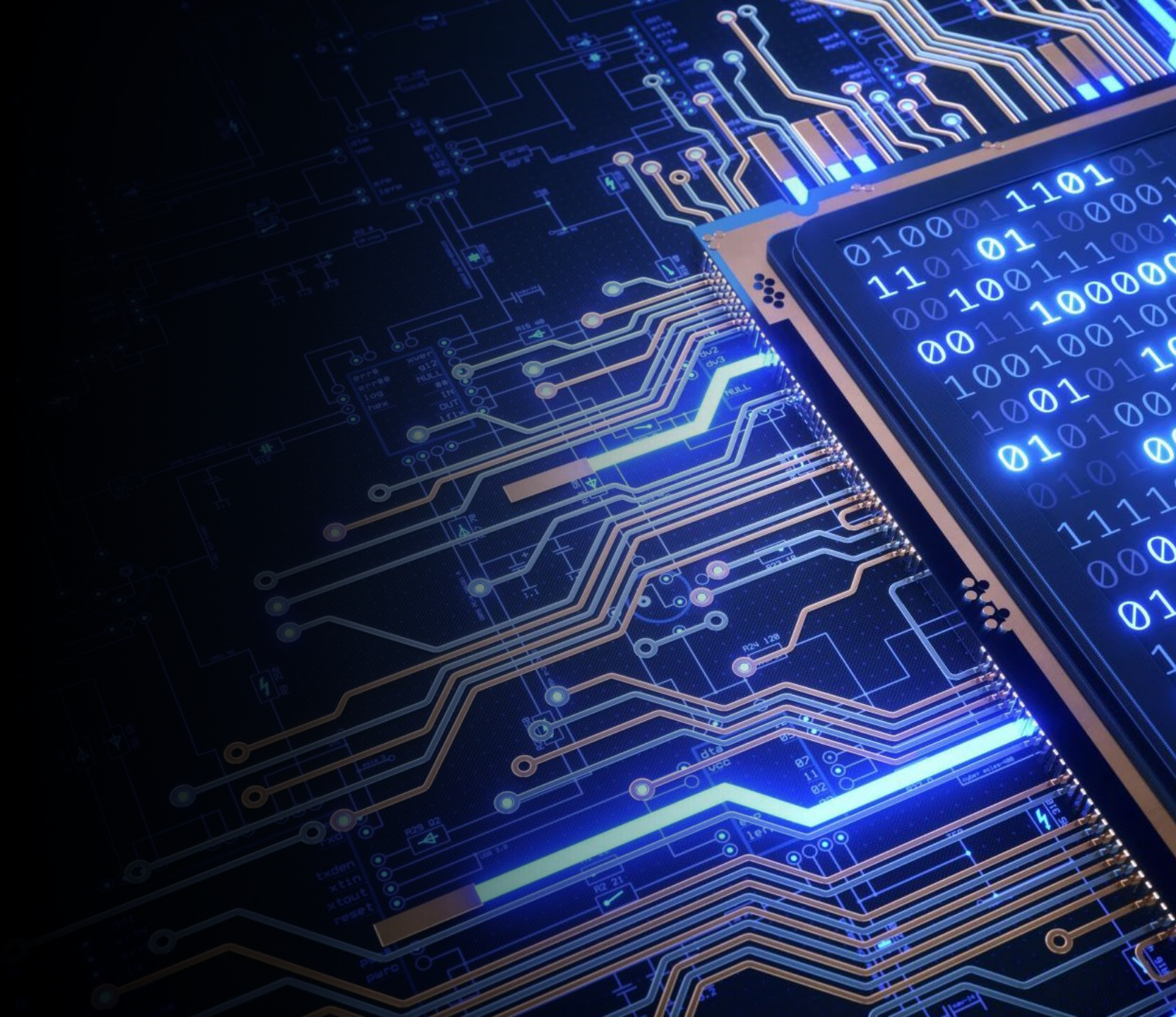
- Descript – audio and video editing
- Copy.ai – marketing content
- Blog title generator – SEO friendly blog titles





AI for Search, Summary, Automation

- ChatGPT 3.5 and 4.0 – generative AI
- Bing Chat – Search, content generation, summaries
- Google's Bard - Search, content generation, summaries



AI Meetings Assistant

- Otter.ai or Tactiq
- Joins your Zoom/Google/Teams/Webex meetings
- Transcribes and shares with attendees
- Creates outline, meeting notes, action items



Tactiq AI Summary

XXXX and Catherine discuss starting a law firm and the services available at the Center for Practice Management. They also discuss address options, insurance policies, succession planning, and taking payments from clients. They discuss various ways to charge clients for legal services and the logistics of taking payments. Catherine recommends getting a practice management software like Clio or LawPay to manage payments and client communication. They also discuss the importance of getting a privileged license and marketing strategies. Catherine recommends using Microsoft 365 for its integrations and suggests using the free Calendly tool for scheduling meetings.

- Catherine introduces XXXX to Otter, an AI app that transcribes meetings and identifies action items.
- XXXX discusses her desire to start a law firm and her experience in XXXX law.
- They discuss address options and the pros and cons of different services.
- They discuss insurance policies and succession planning.
- They briefly discuss taking payments from clients and maintaining a fiduciary trust account.
- They discuss different ways to charge clients and logistics of taking payments.
- They recommend using Clio and LawPay for practice management and payments.
- They discuss marketing strategies, including referrals and website language.
- Catherine recommends using timelines to help clients understand legal transactions.
- They suggest using Microsoft 365 and Calendly for scheduling.
- Catherine recommends using Google Voice for a business phone number.
- They discuss the requirements for letterhead and malpractice insurance.
- They briefly discuss health insurance.

AI for Design and Presentation

- MS Creator and Designer – AI design tools
 - Gamma App – presentations
 - Stunning.so – website builder
 - MS Word outline to PPT
-

```
mirror_mod = modifier_ob.  
# Add mirror object to mirror_mod  
mirror_mod.mirror_object =  
operation == "MIRROR_X":  
mirror_mod.use_x = True  
mirror_mod.use_y = False  
mirror_mod.use_z = False  
operation == "MIRROR_Y":  
mirror_mod.use_x = False  
mirror_mod.use_y = True  
mirror_mod.use_z = False  
operation == "MIRROR_Z":  
mirror_mod.use_x = False  
mirror_mod.use_y = False  
mirror_mod.use_z = True  
  
# Selection at the end -add  
mirror_ob.select= 1  
modifier_ob.select=1  
context.scene.objects.active  
("Selected" + str(modifier_ob.name))  
mirror_ob.select = 0  
= bpy.context.selected_objects  
data.objects[one.name].select  
  
print("please select exactly one mirror object")  
  
-- OPERATOR CLASSES --  
  
types.Operator):  
on X mirror to the selected  
object.mirror_mirror_x"  
mirror X"  
  
context):  
context.active_object is not None
```

Understand How AI Is Being Used In Legal Tech

RAVEL
a LexisNexis® Company



**Bloomberg
Law®**

NICE · nexidia

Thomson Reuters

Westlaw Edge™



casetext



Lex Machina®
A LexisNexis® Company

JUDICATA

reveal™

lexbe™

ayfie

text IQ


Relativity®

DISCO

casepoint

VERITONE.

Casetext CoCounsel



CoCounsel is powered by
OpenAI's GPT-4, the first AI to
pass the bar

CoCounsel builds on the power of GPT-4, the
AI that outperformed real bar candidates

Josef Q

ABC Parental Leave Q&A

Creating clarity from complexity – your FAQs, simplified.

Do both parents get the same leave?

Ask

The answer

Yes, both parents get the same leave. We do not differentiate between primary and secondary carers, and all parents equally have access to 20 weeks of fully paid parental leave.



This was helpful



Expand on the answer



This doesn't make sense



LAWDROID

PRODUCTS ▾

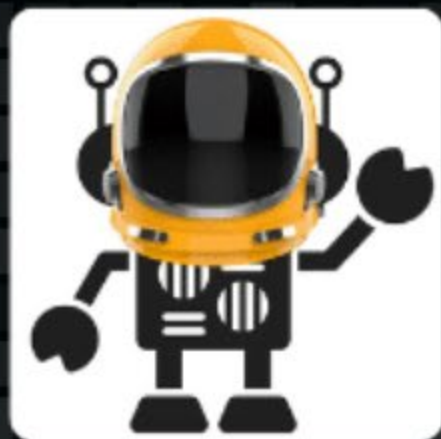
TESTIMONIALS

RESOURCES ▾

LABS

SCHEDULE DEMO

LOGIN



LAWDROID Copilot

Use Our AI Legal Assistant to Research Legal Issues, Help Draft Emails and Letters, Summarize Documents and Keep You Happy 😊.

Get Early Access

Close better deals, faster.

Spellbook gets the small stuff out of the way so that you can focus on adding strategic value.



Suggest language ▾

Instantly draft new clauses and entire sections based on the context of your agreement.



Detect aggressive terms >



List missing clauses & definitions >



Negotiation suggestions >

Spellbook



Draft

Accept

Try Again

Word

Master Services Agreement

1. SAAS Services

2. Restrictions and Responsibilities

3. Confidentiality; Proprietary Rights

3.1 Customer shall own all right
Company shall own and ret
and Software, all improv
software, applications
with Implementation
and (d) all intell

What Can Auto Redaction Find Out For You

iDox.ai Redaction helps you to find sensitive informations in your document with just one click.

<https://www.idox.ai/>



Personal Info



Sensitive Info



Health Info



Financial Info



Medical Info



Social Security Info



Bank Account Info



Other Related Info

Taking Document Security To The Next Level

SELF SERVE DATA

Get the answers you need without knowing SQL.

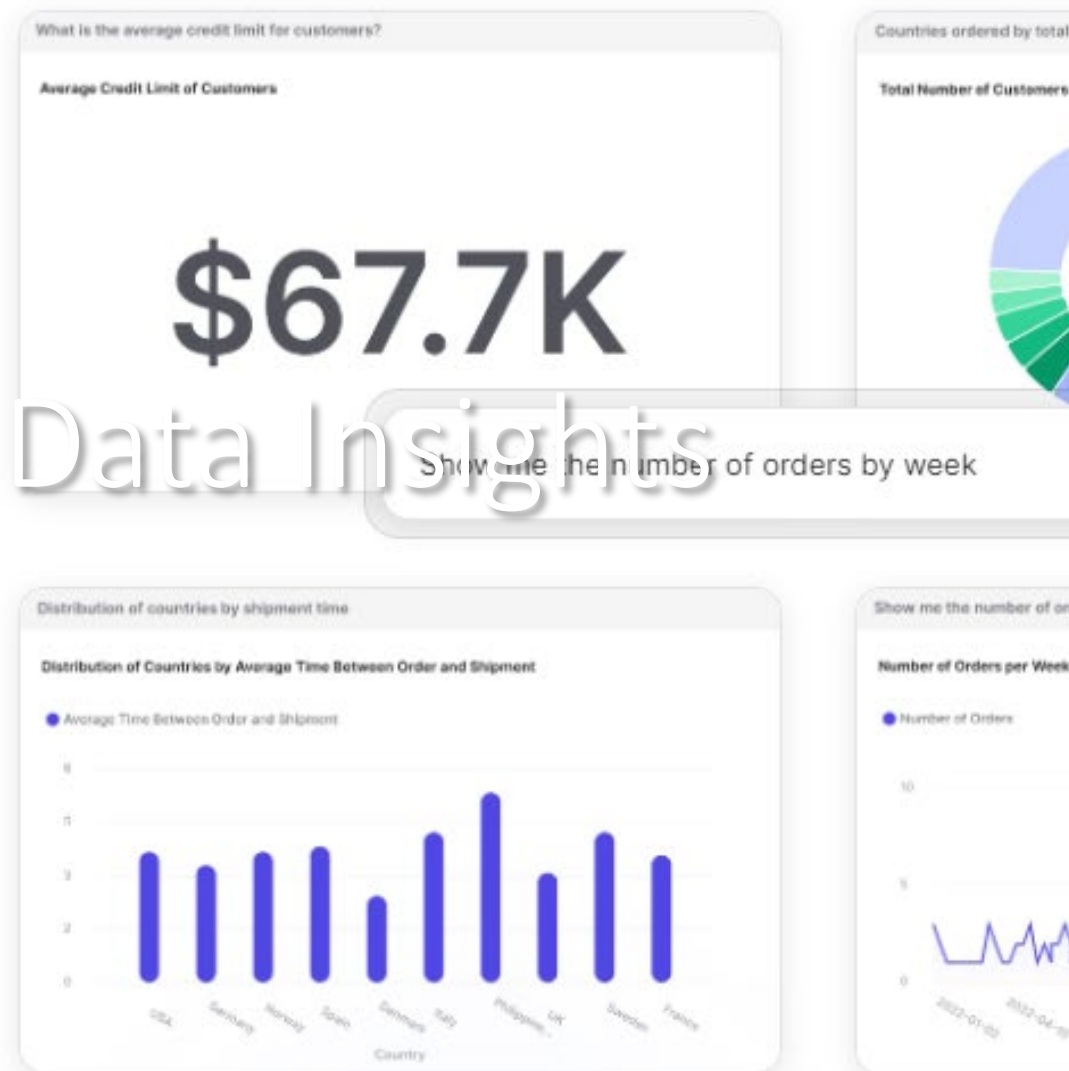
Self serve your data insights, finally.

Channel (BETA) – AI Data Insights

⚡ **Query in plain english.** No matter how complex your warehouse, Channel learns how to get the answers you need from just plain English.

📊 **Beautiful visualisation.** Channel automatically generates beautiful visualisations for your data, and picks the right chart type based on your preferences.

▶ **Self service, for real.** Channel is designed to be used by anyone, from analysts to product managers. No more waiting for the data you need.



Digital Detox & Declutter

What we know in 2023?

- According to Pew, 70% of adults and 81% of teens use social media.
- Suicide rate among 10-24 year-olds was stable from 2000-2007. It increased by 57% between 2007 and 2017.
- Suicide is now the 2nd leading cause of death among those between the ages of 10 – 34.

Digital Detox & Declutter

What we know in 2023?

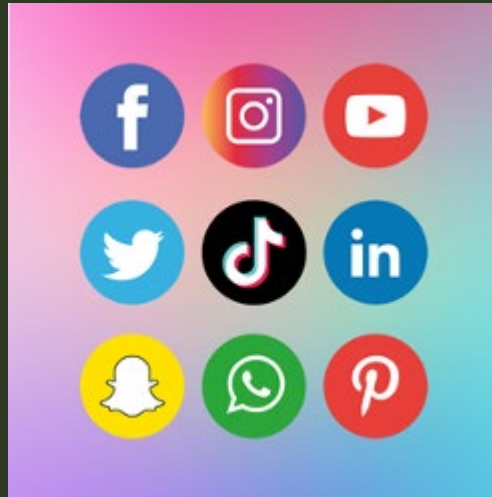
- For 50 years, it took us 15 minutes to return to work after an interruption.
- Since 2017, that number has increased to 25 minutes!

80



Number of times the average worker checks their phone in a day.

2.5 hours a day

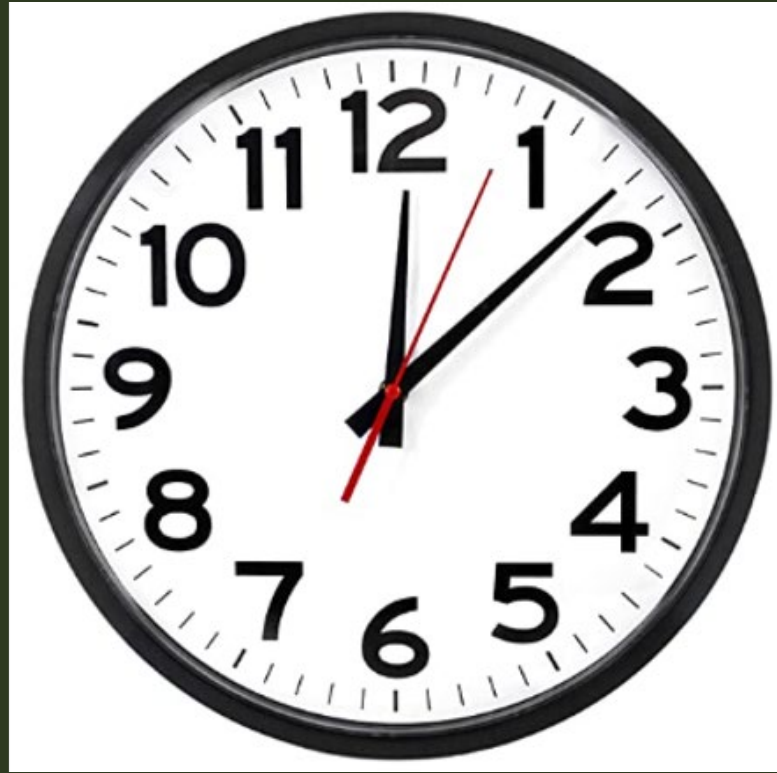


... and 50% of time spent on mobile device is on social media

Digital Detox and Declutter

Why Do it? If for no other reason ...

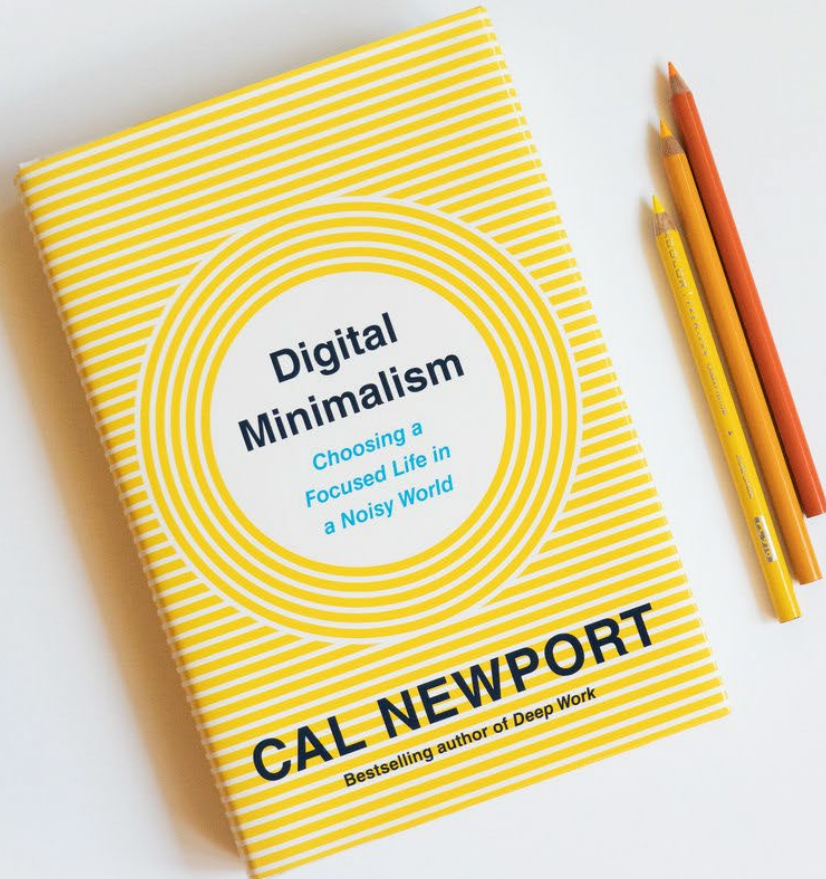
**RE-CLAIM 5-
10 HOURS
PER WEEK!**



SOCIAL MEDIA FAST



DIGITAL MINIMALISM



Social Media Fast/Detox



- **Delete Apps from Mobile Device**
 - **30 Days**
 - **Plan Replacement Activities**
 - **No Decisions until the End**
- **Set Boundaries & Re-Introduce what truly furthers your Values**

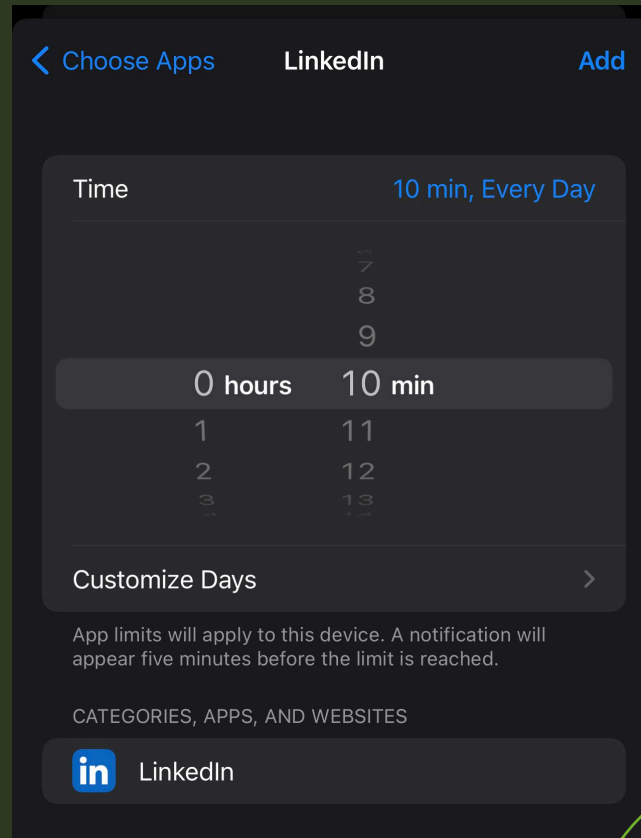
DIGITAL BOUNDARY EXAMPLES



- **No Social Media between 8 am – 5 pm**
- **Only 15 min of total Social Media per day**
- **No Devices after 9 pm/no email after 7 pm**
- **Instagram for post Art Projects – that's it**
 - **Phone Free Food**
- **Only Follow Family and Close Friends**

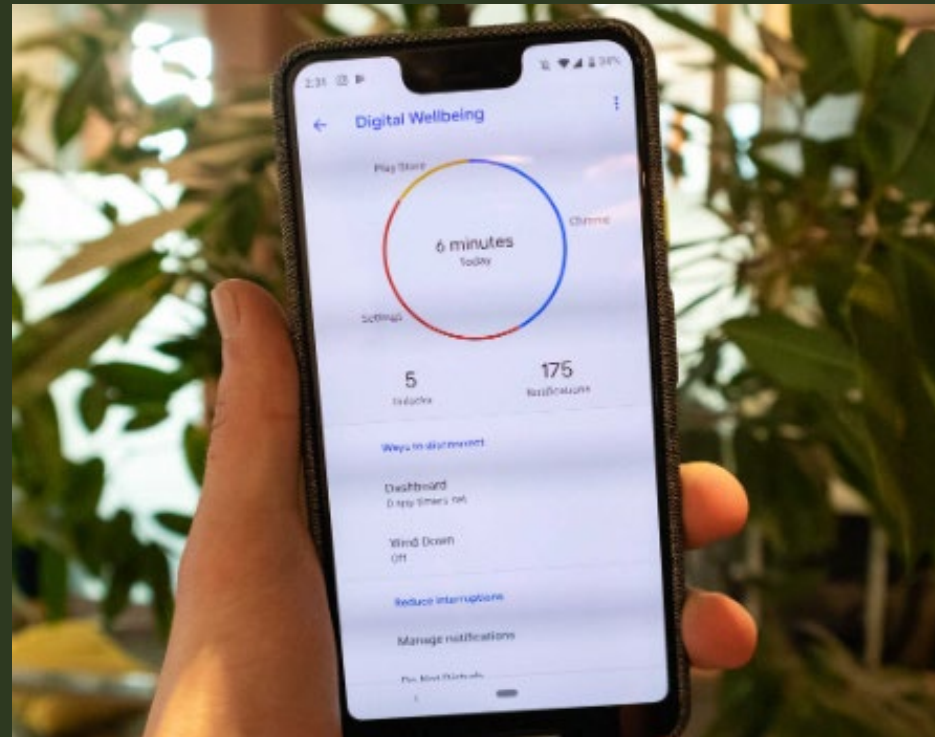
Limit Time on iPhone

Settings > Screen Time > App Limits > Add Limit



Limit Time on Android Phone

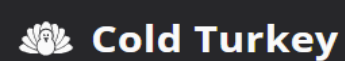
Add Screen Time Widget
Touch & Hold Home Screen > Tap Widgets



Block Yourself – Set Boundaries

Cold Turkey – www.getcoldturkey.com (\$39)

Web or Mobile Apps



Products ▾

Features

Support

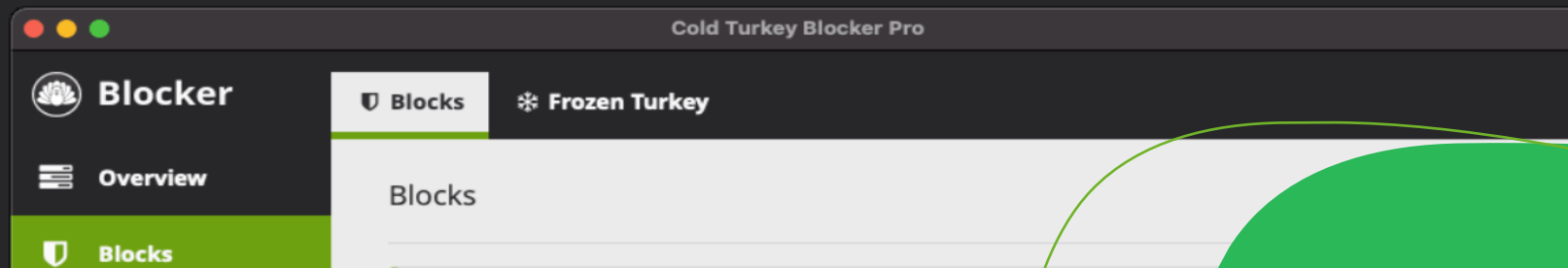
Download

Your future self will thank you.

Block websites, games and applications to boost your productivity
and reclaim your free time.

Download

Explore Features





Microsoft 365 & Windows 11

Windows 11 – Dictation Anywhere

Windows Key + H

You can already dictate in
Word, Outlook, PowerPoint
and OneNote

This allows you to dictate
anywhere else!





Copilot

A whole new way to work



Welcome to the new Bing

Your AI-powered copilot for the web



Ask complex questions

"What are some meals I can make for my picky toddler who only eats orange-colored food?"



Get better answers

"What are the pros and cons of the top 3 selling pet vacuums?"



Get creative inspiration

"Write a haiku about crocodiles in outer space in the voice of a pirate"

Let's learn together. Bing is powered by AI, so surprises and mistakes are possible. Make sure to check the facts, and [share feedback](#) so we can learn and improve!

[Terms of Use](#) | [Privacy Statement](#)

Choose a conversation style [Preview](#)

More
Creative

More
Balanced

More
Precise

Word

Onboarding New Hires Leveraging Technology - Saved

Search (Alt + Q)

FileHomeInsertDesignLayoutReferencesReviewViewHelp

Clipboard

Font

Paragraph

Styles

Editing

Reuse Files

Voice

Editor

Designer

Comments

Catch up

Editing

Share

Onboarding New Hires Leveraging Technology

Many law firms are excited to embrace new hires and provide orientation and some onboarding. Then the new hire is left in the coming weeks or months to sink or swim. Handing a new hire, whether an associate, a lateral, or support staff, an employee manual and making introductions cannot ensure a smooth transition.

Set Up for Success

Once your firm has made a hire there is a lot to do to prepare for their arrival. If you do not already have one, create a checklist. They will need a phone extension, an email address, licenses to your software, application subscriptions, a new laptop, peripherals acquired, and network access and permissions set up. Then send the new hire their phone number and email address so they can update their contacts and LinkedIn profile.

If they will work in an office, create their physical space and give it cleaning and sprucing up. Don't forget to make keycards, parking passes, or anything else needed for physical access if applicable. It is

Many lawyers may focus on a list-oriented project plan that flows in a mostly linear

ChatComposeInsights

Summarize this article in bullet points

Here are some bullet points summarizing the current web page context:

- Many law firms are excited to embrace new hires and provide orientation and some onboarding. Then the new hire is left in the coming weeks or months to sink or swim.
- Once your firm has made a hire there is a lot to do to prepare for their arrival. If you do not already have one, create a checklist.
- They will need a phone extension, an email address, licenses to your software, application subscriptions, a new laptop, peripherals acquired, and network access and permissions set up.
- If they will work in an office, create their physical space and give it cleaning and sprucing up.
- If the new hire is a lateral, do a conflicts check right away and create ethical walls as necessary.
- Add the new hire to your firm's website and get their help with the creation of a bio.
- If you do an orientation for individuals or groups, get that on the employee's calendar.


8-39





a tugboat in high waves with some seagulls

Bing Image Creator | 1024 × 1024 jpg | 29 days ago

 Share

 Save


 Download

 Feedback

Created with AI

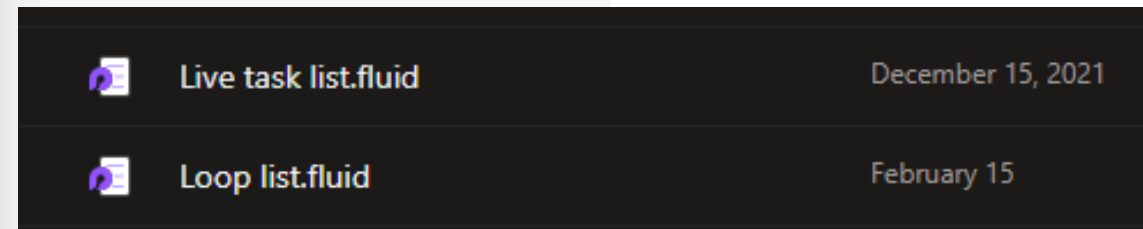
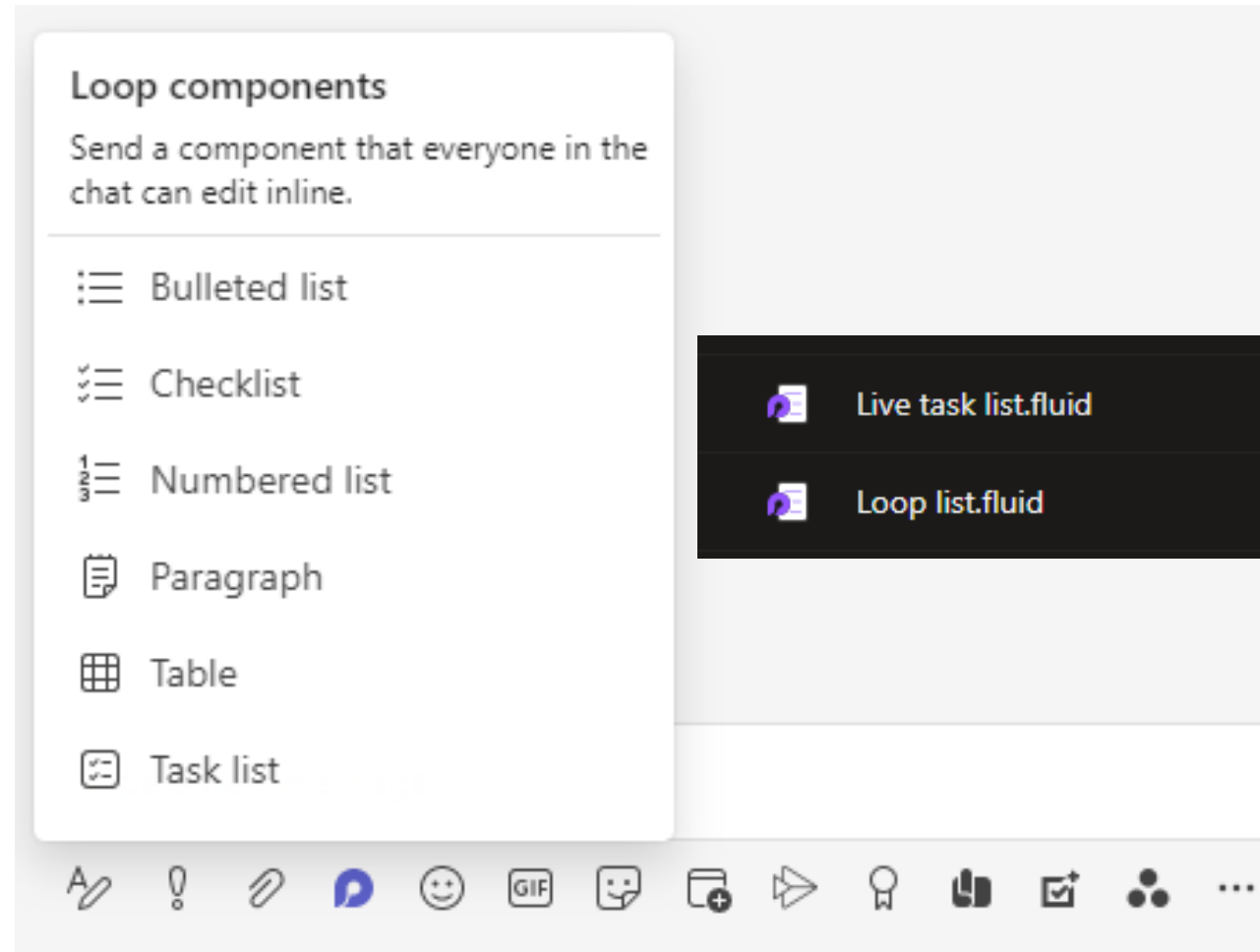
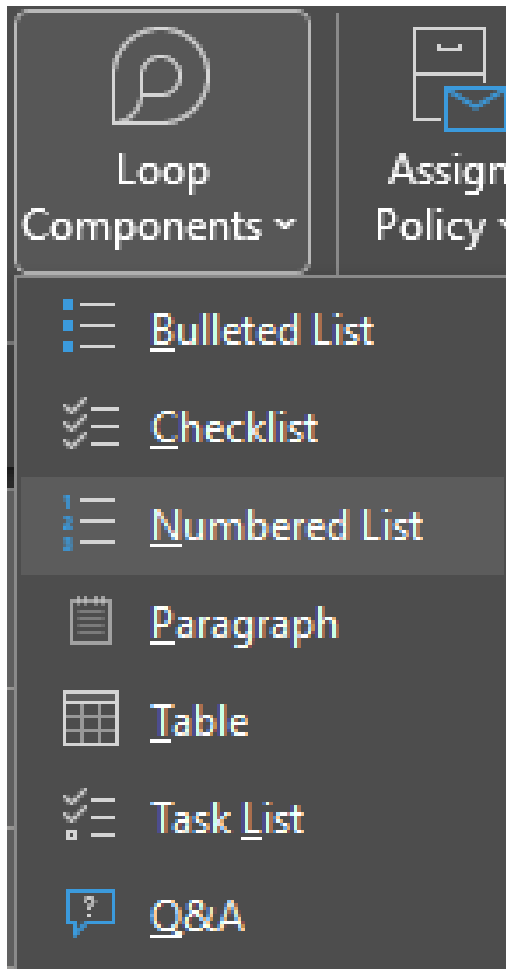


Welcome

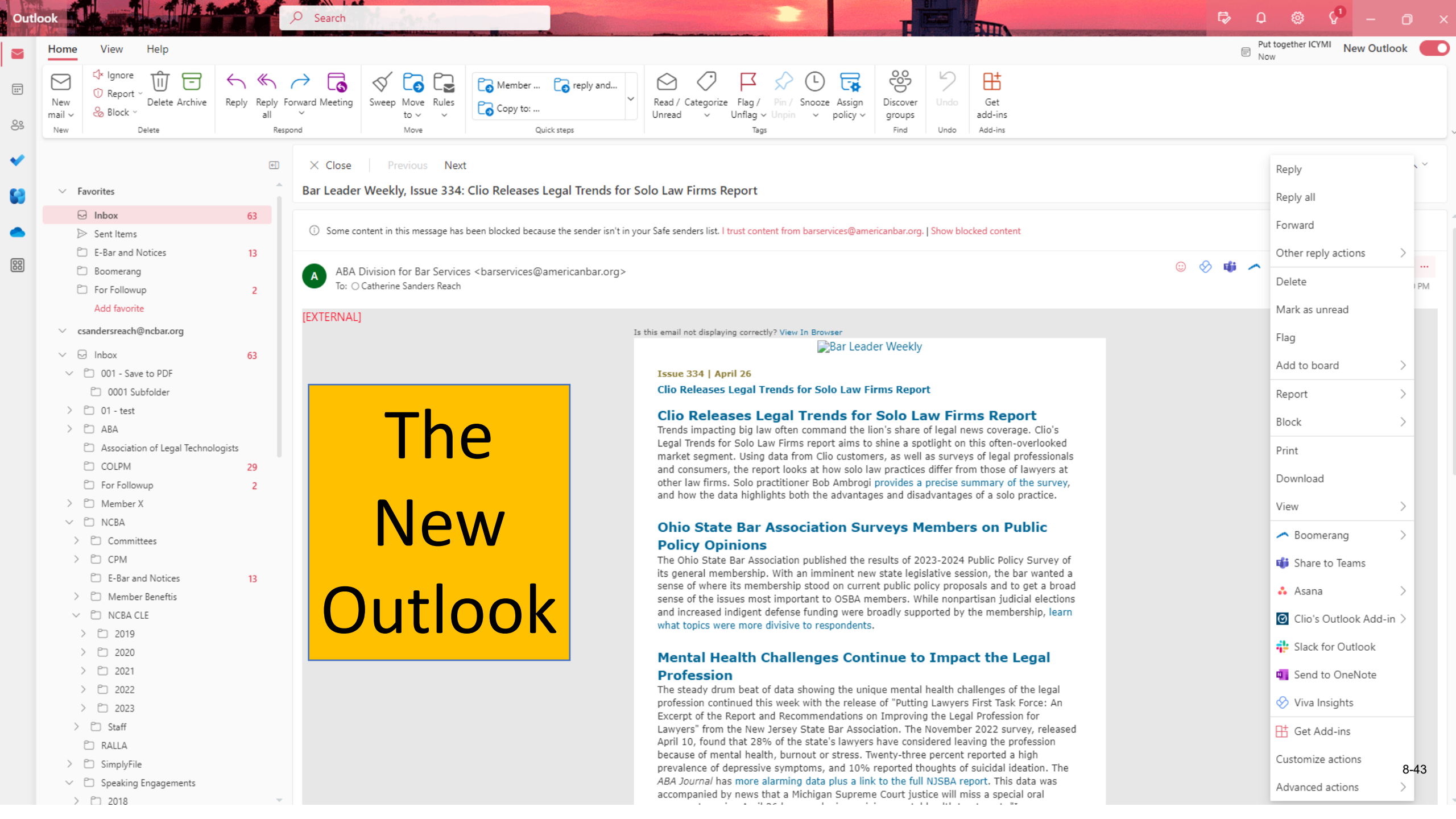
-  We are the Loop team and we're excited to have you join us for the Public Preview! This workspace is all about helping you learn and have fun with the app. Check out the sidebar to start exploring all the cool stuff you can do! 😊
- 

About Loop

Microsoft Loop is the next-generation co-creation app that connects teams and tasks across your tools and devices. It's a new way of working — so you and your team can think, plan, and create together from anywhere!



Loop Components



AI Driven Virtual Agents

Power Virtual Agents

Environment
North Carolina Bar Asso...

Chatbots

Overview

Topics

Entities

Analytics

Publish

Settings

Test bot

Track between topics

Chat

Hi! I'm a virtual agent. I can help with account questions, orders, store information, and more.

If you'd like to speak to a human agent, let me know at any time.

So, what can I help you with today?

Just now

Type your message

Hide bot

Copy of Meeting Bot

View Solution (Common Data Services Default Solution)

Create generative answers (preview)

Boost your conversations in real time based on selected content to answer unanticipated questions. [Learn more](#)

Get started in AI Capabilities

Learn more

[Power Virtual Agents documentation](#)

Product videos

[Building bots better together](#)

Edit and test your bot

Customize topics to fit your business. Test the bot to see the conversation in action.

Test bot

Tell us what you think

Ask questions and learn from the community

[Support community](#)

Do

rine Sanders Reach
sreach@ncbar.org

ay

tant 1

ed 44

ned to you 1

ed email 46

6

P 4

SHOW Wrapup

magazine Hot Buttons... 2

Response Ideas

Flagged email

Flagged this week 2

✓ pandemic-outline
Message

✓ NCBA Estate Planning and Fiduciary Law Section Annual Meeting
Message

✓ ARAG Webinar-guest-request
Message

○ 40 Tips in 40 Minutes- the webinar
Mon, Mar 16

○ rp digest: March 15, 2020
Mon, Mar 16

Flagged last week 0

✓ Consultation Request Submitted
Message

40 Tips in 40 Mini
webinar

+ Add step

Add to My Day

Remind me

Due Mon, Mar 16

Repeat

Open in Outlook >

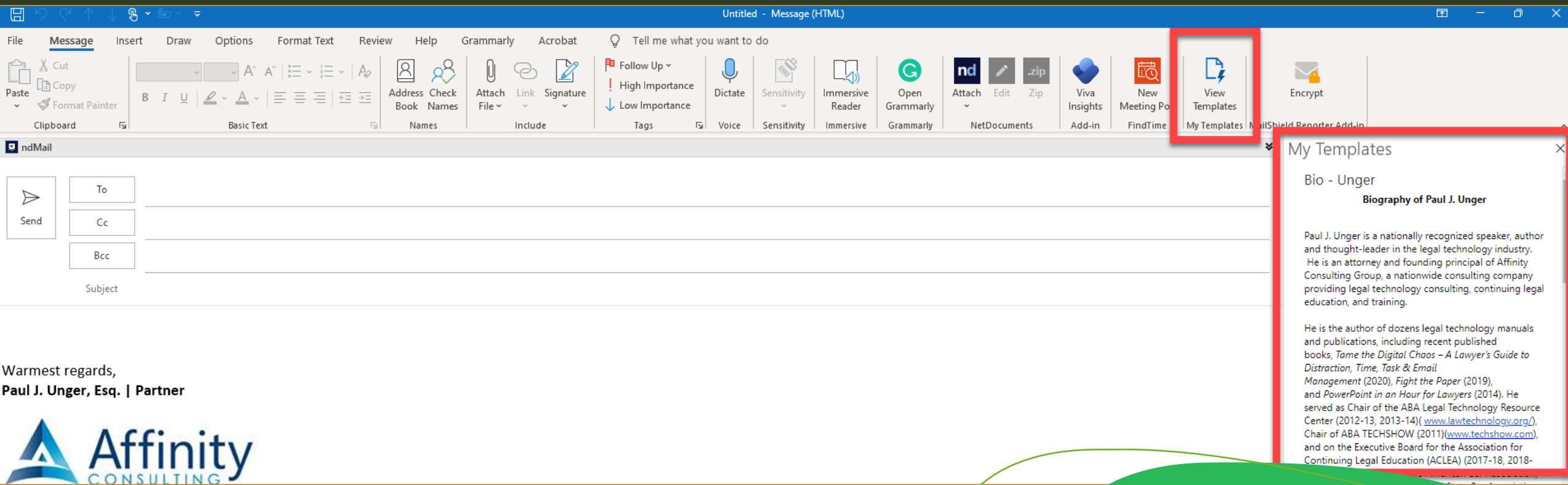
[EXTERNAL]
Good Morning from my snor

We would like to morph the
presentation planned for the

To-Dos from Flagged Emails

8-45

Automate Responses with Email Templates!



The screenshot shows the Microsoft Word interface with the 'Message' ribbon selected. The 'View Templates' button in the 'My Templates' group is highlighted with a red box. A 'My Templates' pane is open on the right, displaying a template titled 'Bio - Unger' with the subtitle 'Biography of Paul J. Unger'. The template content includes a paragraph about Paul J. Unger's professional background and a list of his publications and roles.

ndMail

File Message Insert Draw Options Format Text Review Help Grammarly Acrobat Tell me what you want to do

Clipboard Basic Text Names Include Tags Voice Sensitivity Immersive Grammarly NetDocuments Viva Insights FindTime My Templates MailShield Reporter Add-in

Send To Cc Bcc Subject

Warmest regards,
Paul J. Unger, Esq. | Partner

Affinity
CONSULTING

My Templates

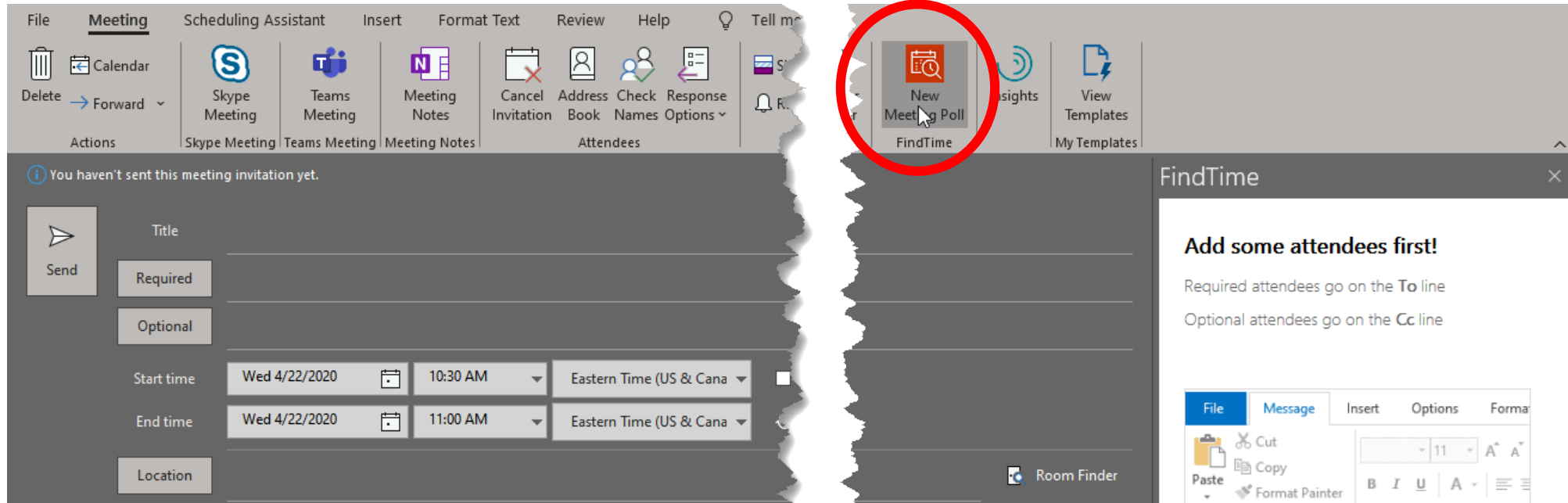
Bio - Unger

Biography of Paul J. Unger

Paul J. Unger is a nationally recognized speaker, author and thought-leader in the legal technology industry. He is an attorney and founding principal of Affinity Consulting Group, a nationwide consulting company providing legal technology consulting, continuing legal education, and training.

He is the author of dozens legal technology manuals and publications, including recent published books, *Tame the Digital Chaos – A Lawyer's Guide to Distraction, Time, Task & Email Management* (2020), *Fight the Paper* (2019), and *PowerPoint in an Hour for Lawyers* (2014). He served as Chair of the ABA Legal Technology Resource Center (2012-13, 2013-14) (www.lawtechnology.org/), Chair of ABA TECHSHOW (2011) (www.techshow.com), and on the Executive Board for the Association for Continuing Legal Education (ACLEA) (2017-18, 2018-

FindTime



The screenshot shows the Microsoft Word ribbon with the 'Meeting' tab selected. The 'FindTime' button, located in the 'Actions' group, is circled in red. The button icon is a calendar with a magnifying glass. Below the button, the text 'New Meeting Poll' and 'FindTime' are visible.

The 'FindTime' task pane is open on the right side of the screen. It has a title bar 'FindTime' with a close button. The main content area contains the following text:

Add some attendees first!

Required attendees go on the **To** line

Optional attendees go on the **Cc** line

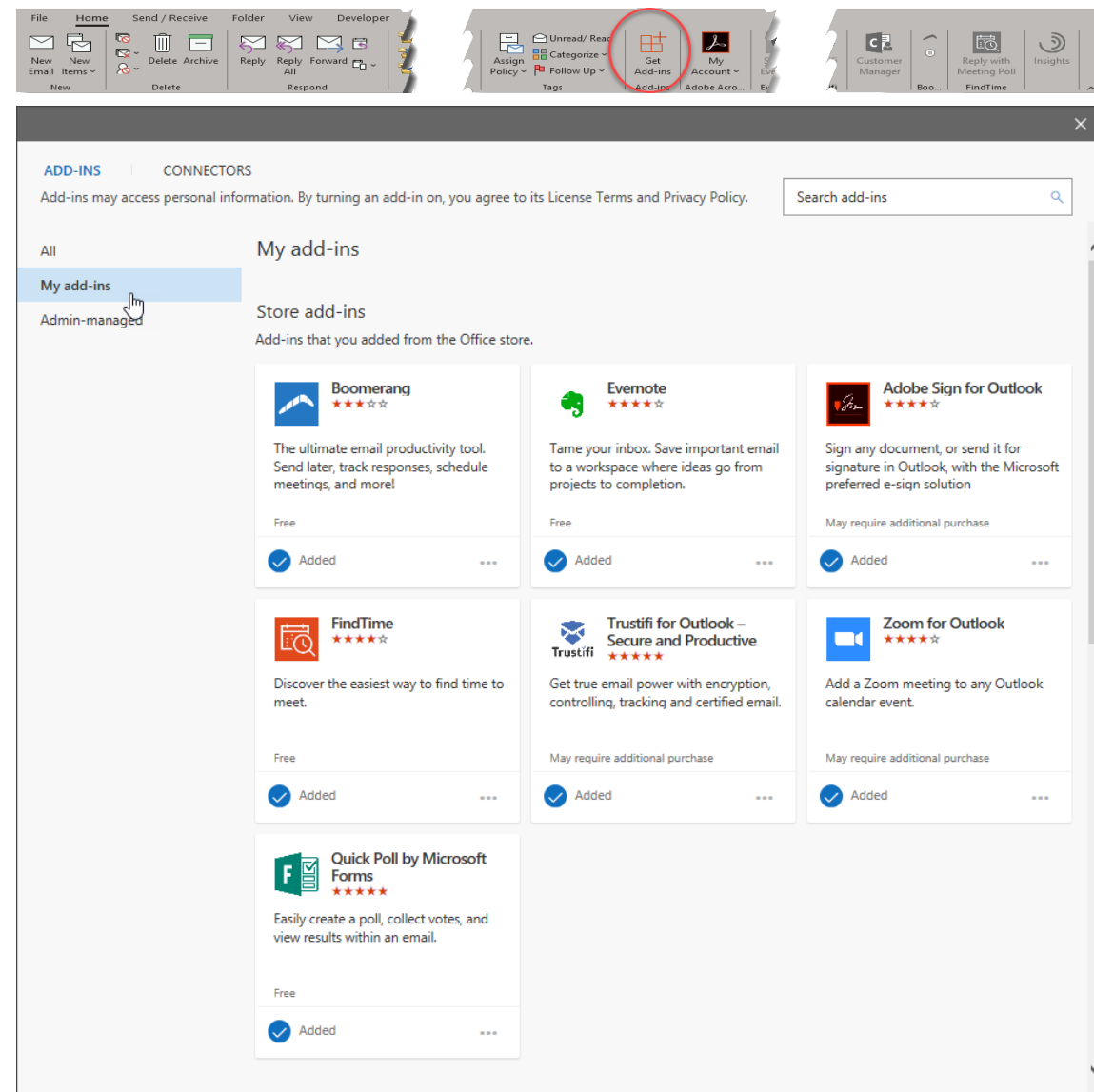
Below this text is a form with the following fields:

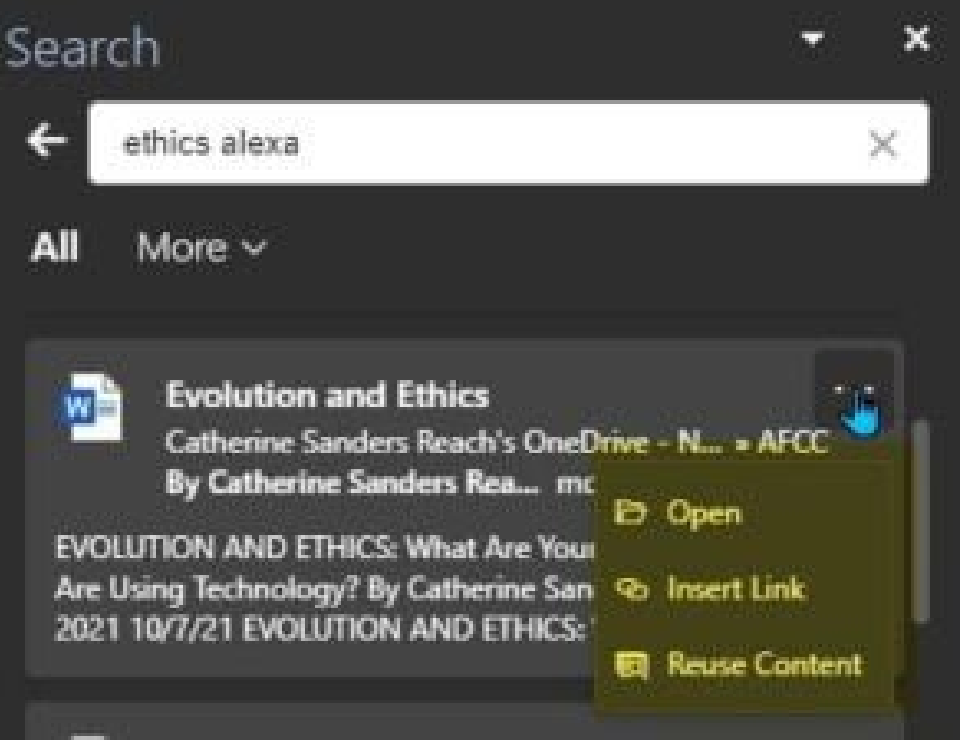
- From:** david@contoso.com
- To:** emma@contoso.com
- Cc:**
- Bcc:**
- Subject:** Discuss sales opportunity

At the bottom of the form is a 'Send' button. Below the form is a text area containing the message:

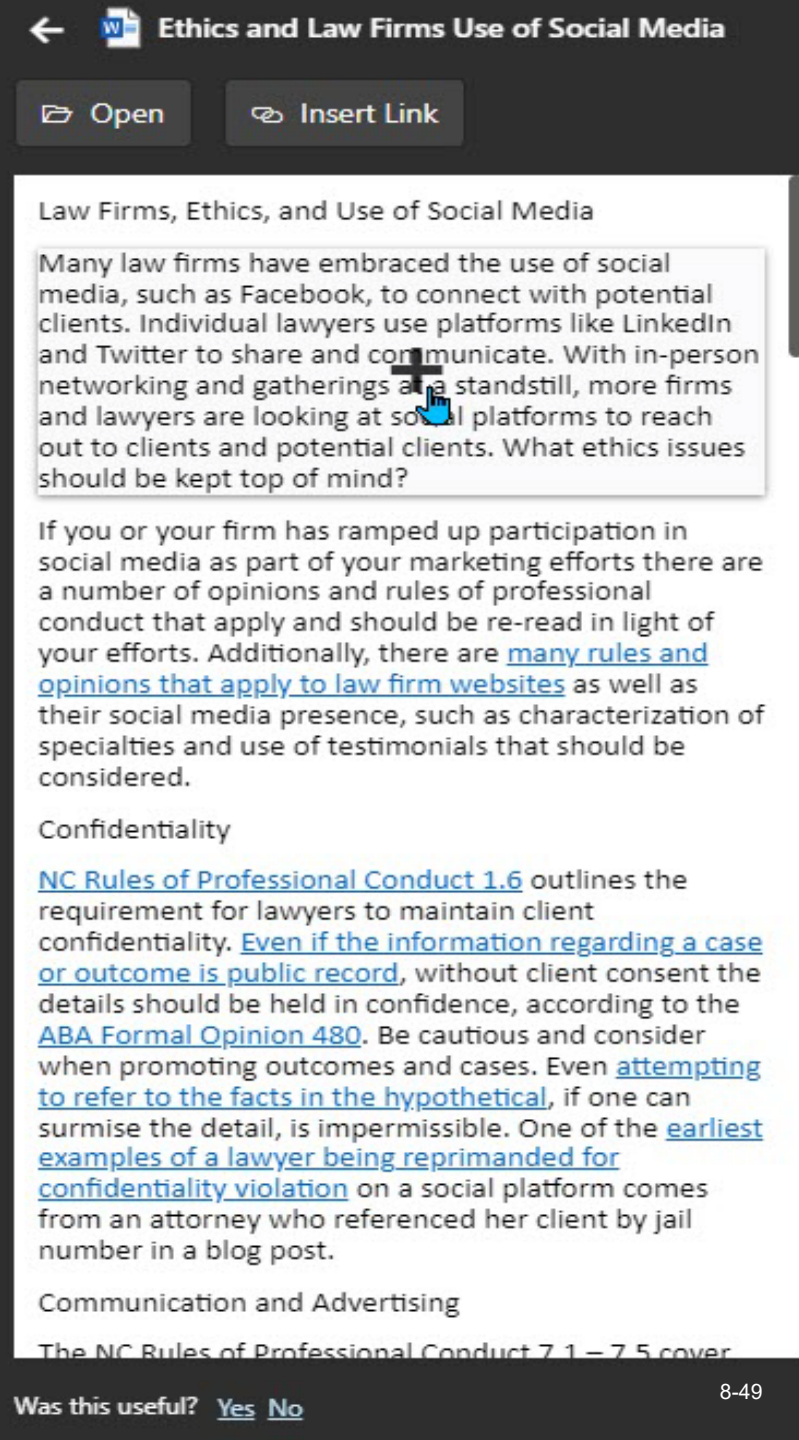
Hi guys, let's find a time to discuss how to make this sale happen.

Finding Outlook Add-ins

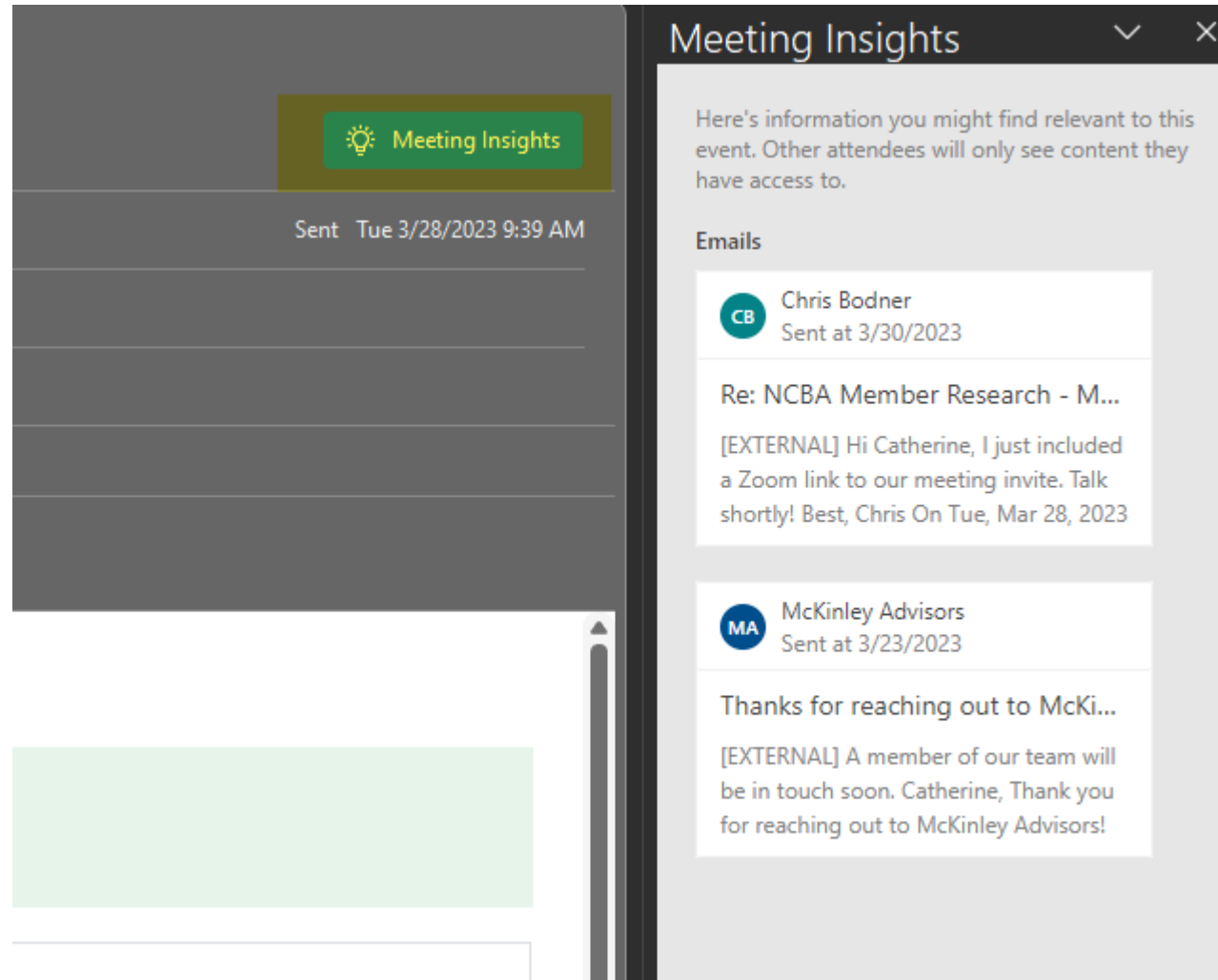


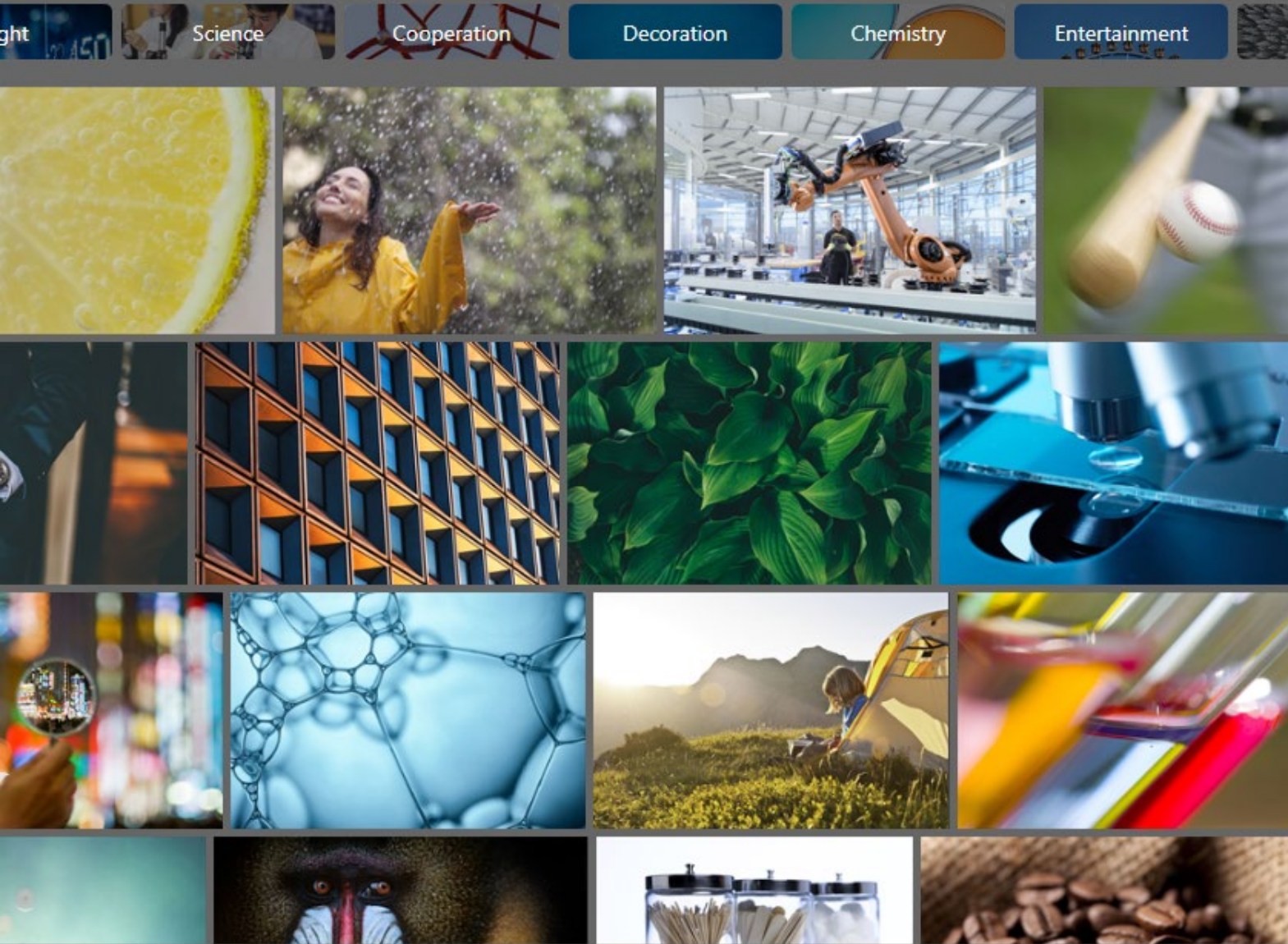


Reuse Files in MS Word



Meeting Insights in MS Outlook Calendar





New Stock Photography In MS Office

MS Lists

Microsoft Lists

Search this list

+ New

Edit in grid view

Share

Export

Automate

Integrate

All Items

CPM Admin

Conflicts Check

Requires Conflict Check	Initiating Event	Date Added	Attorney	Full Party Name	Assigned to	Reviewed by	Completed	Is there a conflict	+ Add column
Yes	Email	December 07, 2020	Erik Mazzone	John William Sims	Catherine Sanders Reach				
yes	Other	December 07, 2020							

ment Ticketing

Stop editing this list

Issue ID	Title	Assigned To	Issue Status	Priority	Due Date	Category
	Sally's trust balance	<input type="checkbox"/> Catherine Sanders Reach	Resolved with Approval	(2) Normal	4/16/2020 12:00 AM	rent Client
	Send Willis Pucket a copy of his deed	<input type="checkbox"/> Catherine Sanders Reach	Active	(1) High	4/17/2020 3:00 PM	Potential Client
	Sue Beam wants to know when contract expires	<input type="checkbox"/> Catherine Sanders Reach	Active	(1) High	4/20/2020 12:00 AM	Current Client
	Resend bill to John Snow (he knows nothing)	<input type="checkbox"/> Catherine Sanders Reach	Resolved with Approval	(1) High	4/17/2020 12:00 AM	Former Client
	Sally wants to add to her evergreen trust balance	<input type="checkbox"/> Catherine Sanders Reach	Active	(2) Normal	4/20/2020 12:00 AM	Opposing Counsel
	Send Larry his file	<input type="checkbox"/> Catherine Sanders Reach	Active	(1) High	4/24/2020 12:00 AM	Co-Counsel
						Other
						Current Client

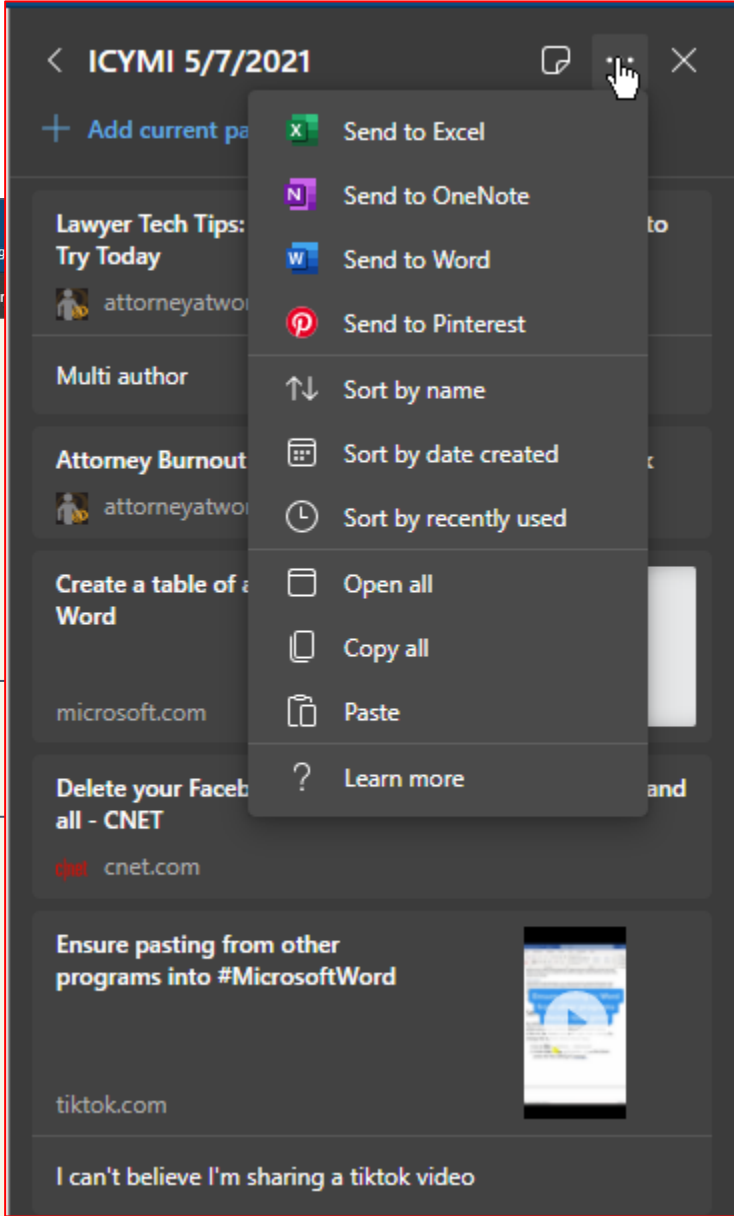
Give MS Edge Browser a Try



Vertical Tabs

Get ready to refresh your online business development toolkit. Our experts have recommendations.

During the pandemic, lawyers have experienced changes in how they

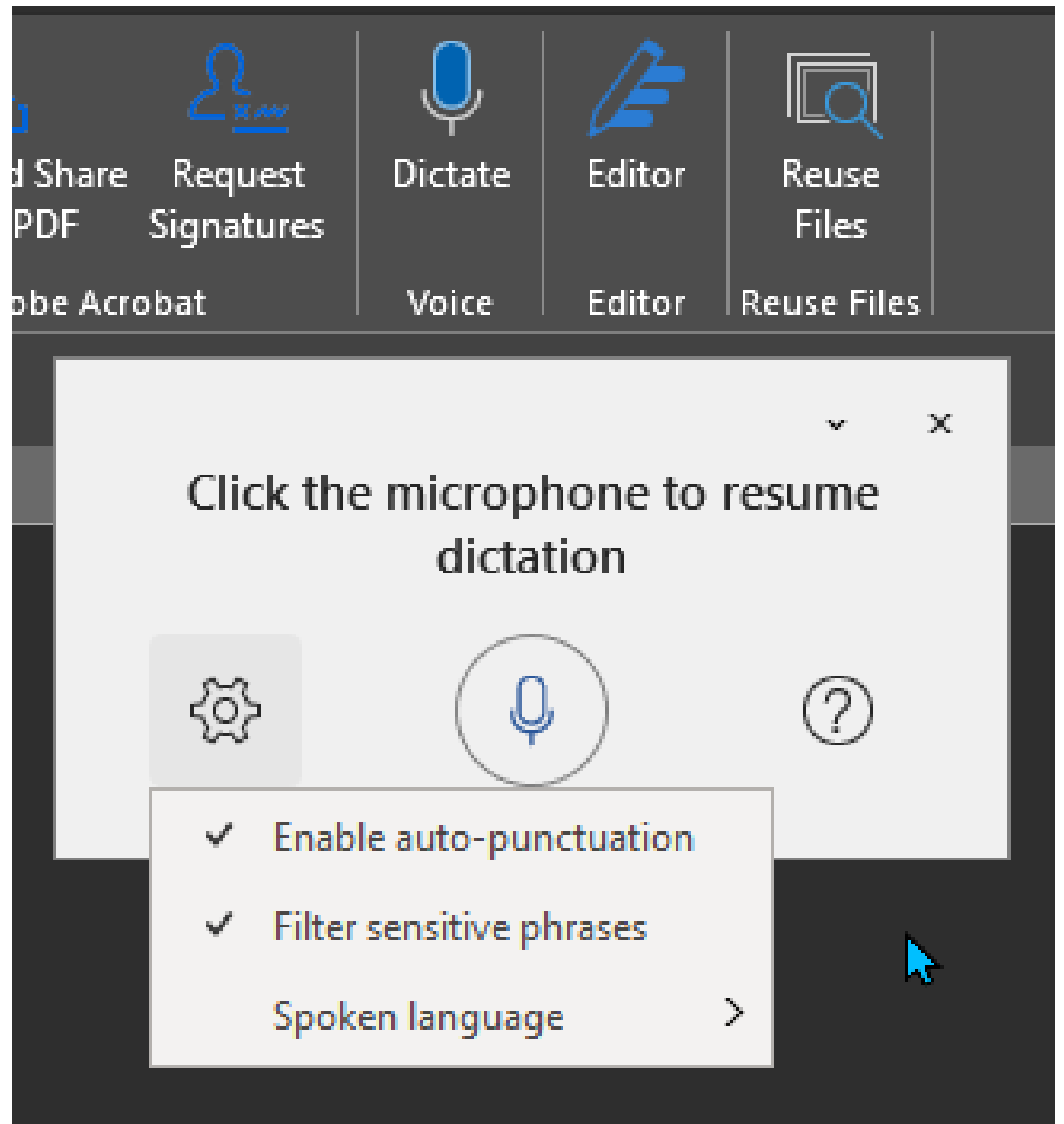


Collections

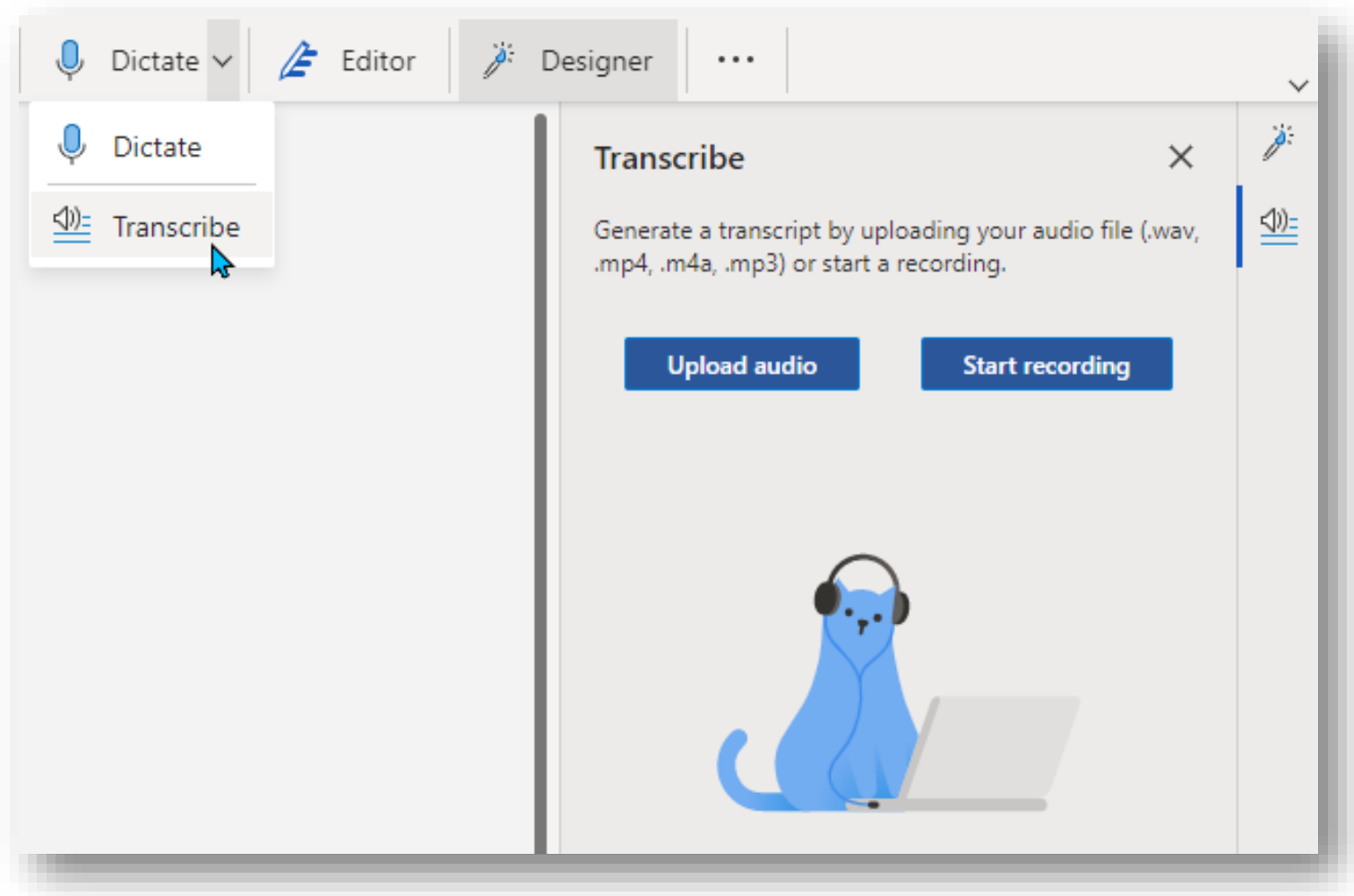


Dictate and
Transcribe in
MS Word

Dictation = Dictate
in MS Word,
Outlook



Transcription = MS Word in the Browser



NCBA Center for Practice Management

CPM Consulting

Initial consult
1 hour



CPM Consulting
1 hour
Free



April 23

< > April 2020

Select staff (optional)

Su	Mo	Tu	We	Th	Fr	Sa
			1	2	3	4
5	6	7	8	9	10	11
12	13	14	15	16	17	18
19	20	21	22	23	24	25
26	27	28	29	30		



Anyone



1:00 pm

2:00 pm

3:00 pm

ⓘ All times are in (UTC-05:00) Eastern Time (US & Canada) ▼

Bookings

Planner

CA

CPM Projects ☆

CPM Admin > General

Board

Charts

Schedule

...

To do

+ Add task

☐

Send Larry a thank you

04/17

0/2

Catherine Sanders Reach

☐

Learning Objectives: Tasks

☐ Post registration link

☐ Prepare materials and demos

☐ Send reminder to registrants

☐ Give presentation

☐ Produce recording

☐ Send link to recording to Jeremy

☐ Send link and follow up to attendees

04/15

0/7

Catherine Sanders Reach

☐

Write article on ToDo from Planner

03/24

Catherine Sanders Reach

Doing

+ Add task

☐

Finalize SFT MS 365 Slides

☐ Get screenshots

☐ Share with CLE Team

04/22

0/2

Catherine Sanders Reach

☐

Contact client for spouse name

☐ Contact client

☐ Sdd name to database

☐ finalize billing record

05/04

0/3

Catherine Sanders Reach

Done

+ Add task

Hide completed 3

☒

Test Task

10/10/2019

Catherine Sanders Reach

Completed by Catherine Sanders...

☒

finalize video

03/23

Catherine Sanders Reach

Completed by Catherine Sanders...

☒

Go to trader joes

02/22

3/3

Catherine Sanders Reach

Completed by Catherine Sanders...

8-58

Create new

Welcome to [Stream \(on SharePoint\)](#). To visit Stream (Classic) [click here](#)

Upload

Recording

Playlist

Recommended

You edited this
Apr 6

Technology in Law Practice:
Whoops, What, and Wow

Law Practice Tech for UNC 1

You recently opened this
10m ago

welcome

You edited this
Apr 6

Responding
to Online
Reviews

Law Practice Tech for UNC

You recently opened this
Apr 6

Recording-20230406_142930

All

Recently opened

Shared

Favorites

Filter by keyword

Filter

Upload

Name	Modified	Owner	Activity
Law Practice Tech for UNC 1 Catherine Sanders Reach's Files	5m ago	Catherine Sanders Reach	You edited this
welcome Test for Georgia	10m ago	Catherine Sanders Reach	You recently opened this
Recording-20230406_142930 Catherine Sanders Reach's Files	Apr 6	Catherine Sanders Reach	You recently opened this
Law Practice Tech for UNC			

Convert Word Online Outline to PowerPoint

Themes

1. Get more out of what you are already paying for
2. Spend for technology where it really matters - anchor tenants
3. Reduce the spend on IT support - increase the spend on products you understand well enough to manage internally
4. Layer human touch on top of automation - and automate everything you can
5. Don't try to replace people with technology - replace pieces of jobs with technology
6. Freelancers are your friend
7. Keep rigorous track of ROI
8. Frugal is savvy, but cheap is for chumps
9. Leverage consumer technology where you can do so safely and ethically
10. Maximize your NCBA discounts

Productivity

1. How to scan documents for free - ELM
2. Google One vs Google Drive - ELM
3. Hidden tricks in Apple Notes - ELM
4. Saving hours with shortcuts - ELM
5. Browsing with savings - CSR
6. Otter.ai - CSR

Office Suite

1. X things you didn't realize Gmail could do - ELM
2. Add-ons and integrations are your friends - CSR

Time, Billing

1. Reducing your AR to \$0 - fixed fees - ELM
2. Zoho accounting - ELM
3. LawPay Pro - New! - CSR
4. Time59 - \$199 per year, unlimited users - CSR


Practice Management

1. Running your practice in Google Workspace - ELM
2. Online scheduling - ELM
3. Running your practice in MS 365 with some help - CSR



1

Free and Cheap Tech March 2023



2

Themes

Get more out of what you are already paying for	Spend for technology where it really matters - anchor tenants	Reduce the spend on IT support - increase the spend on products you understand well enough to manage internally	Layer human touch on top of automation - and automate everything you can	Don't try to replace people with technology - replace pieces of jobs with technology
Freelancers are your friend	Keep rigorous track of ROI	Frugal is savvy, but cheap is for chumps	Leverage consumer technology where you can do so safely and ethically	Maximize your NCBA discounts

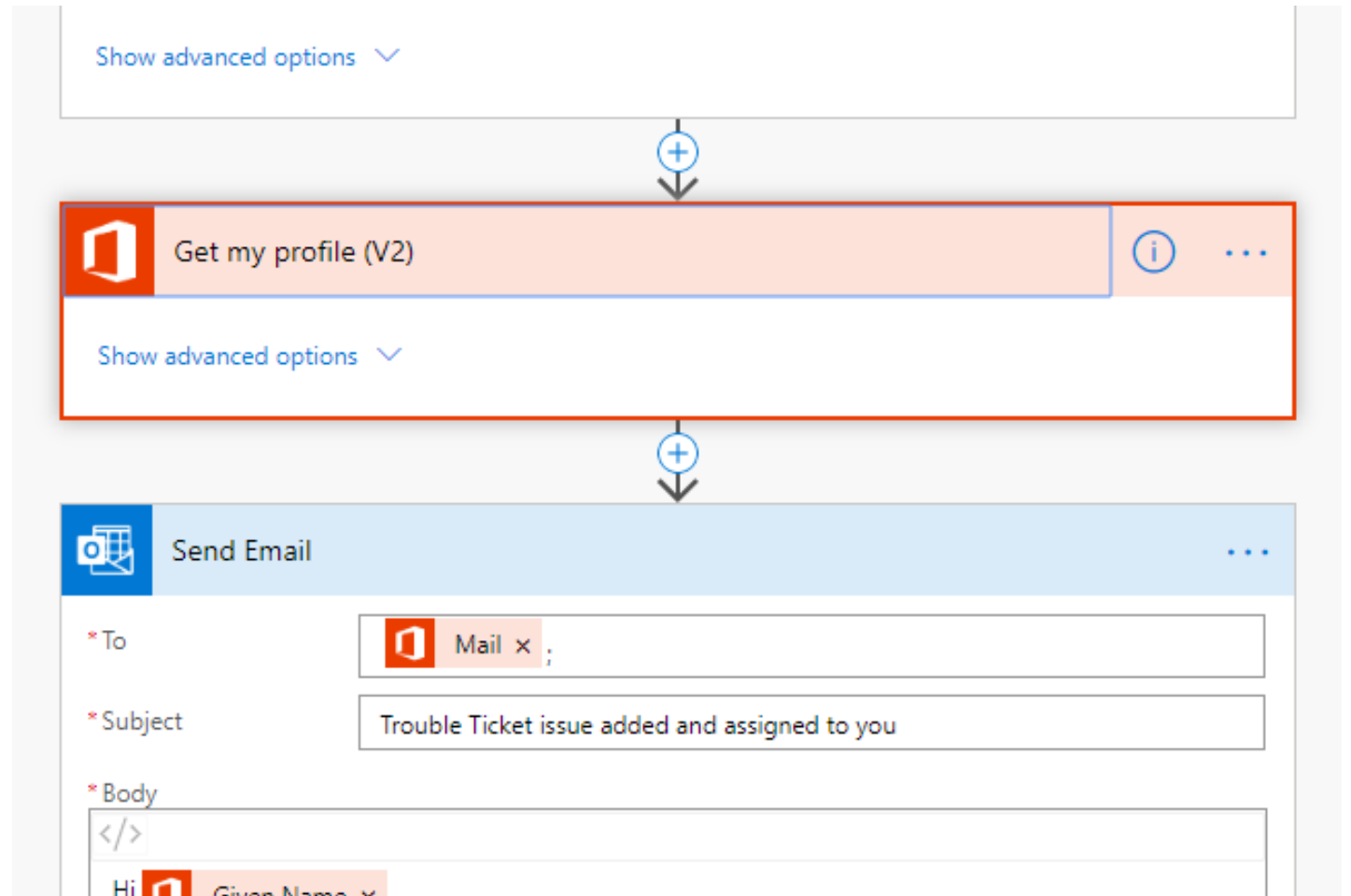
3

Productivity

- How to scan documents for free - ELM
- Google One vs Google Drive - ELM
- Hidden tricks in Apple Notes - ELM
- Saving hours with shortcuts - ELM
- Browsing with savings - CSR
- Otter.ai - CSR

File – Export – Export to PowerPoint Presentation

Power Automate F/K/A Flow



Collaboration

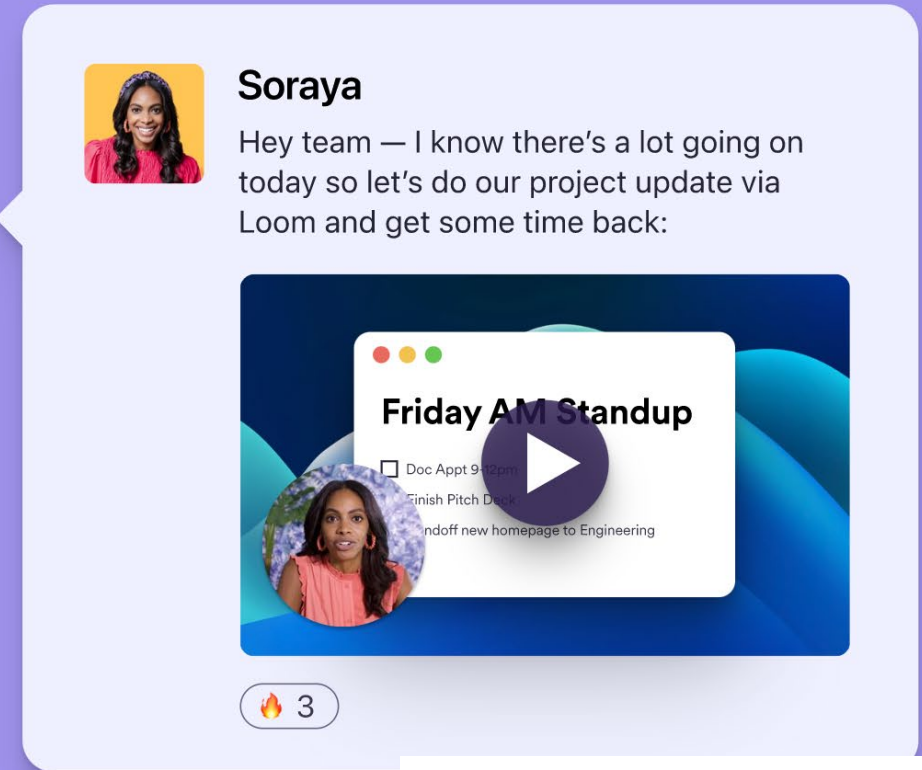


Loom – Video Messaging

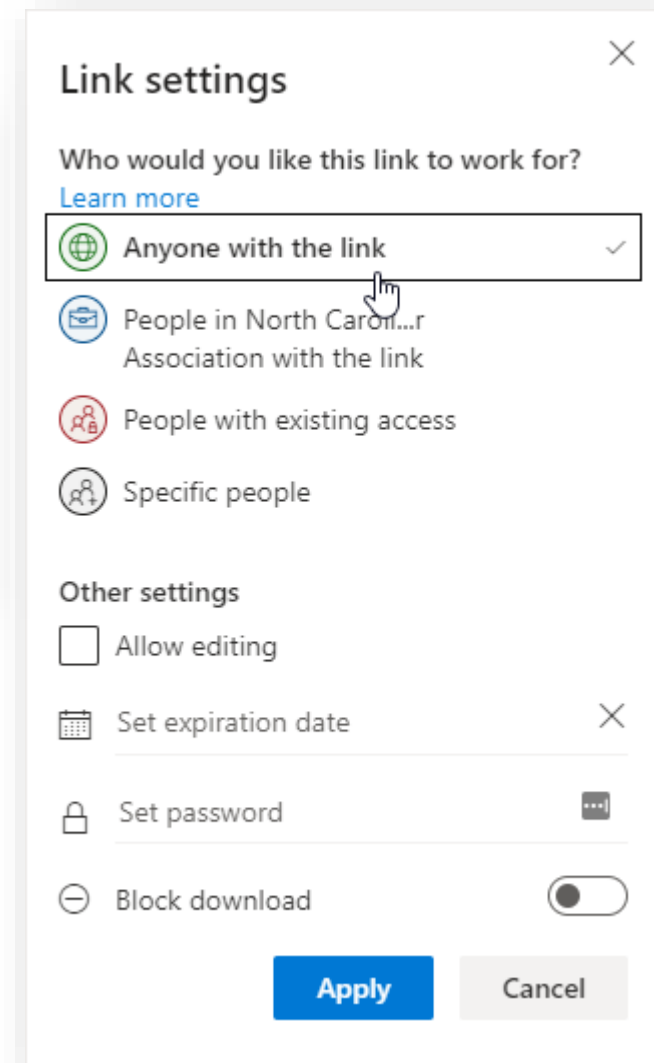
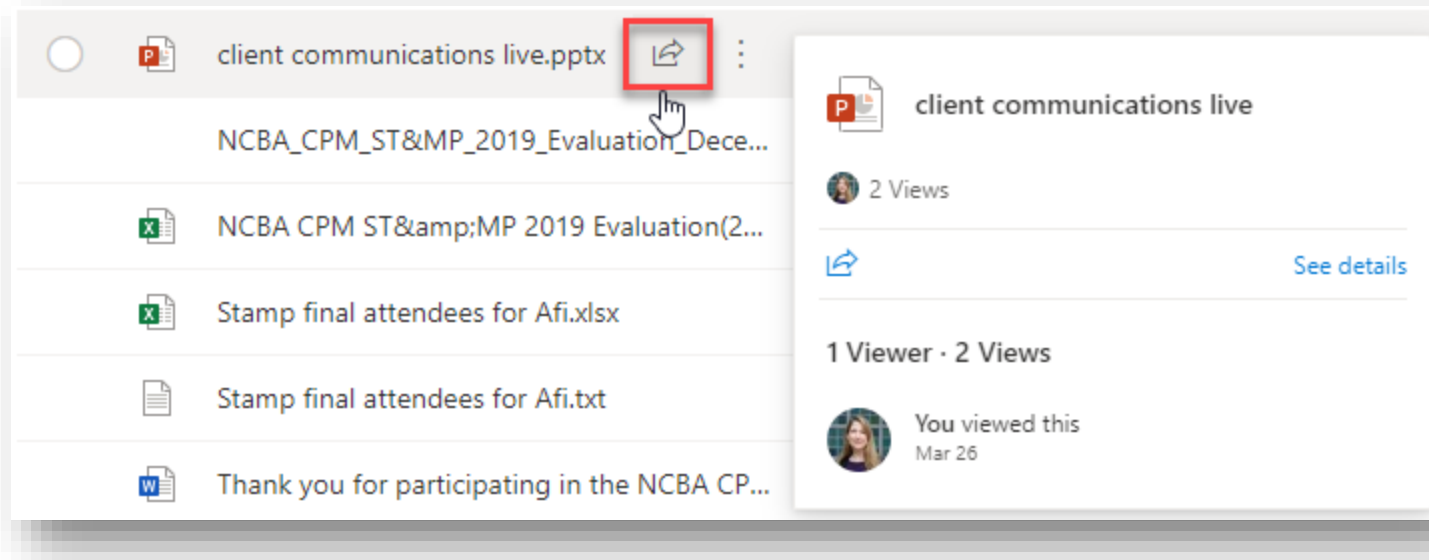
Loom on. Meetings off.

Record quick videos to update your team
and cut down meetings by 29%

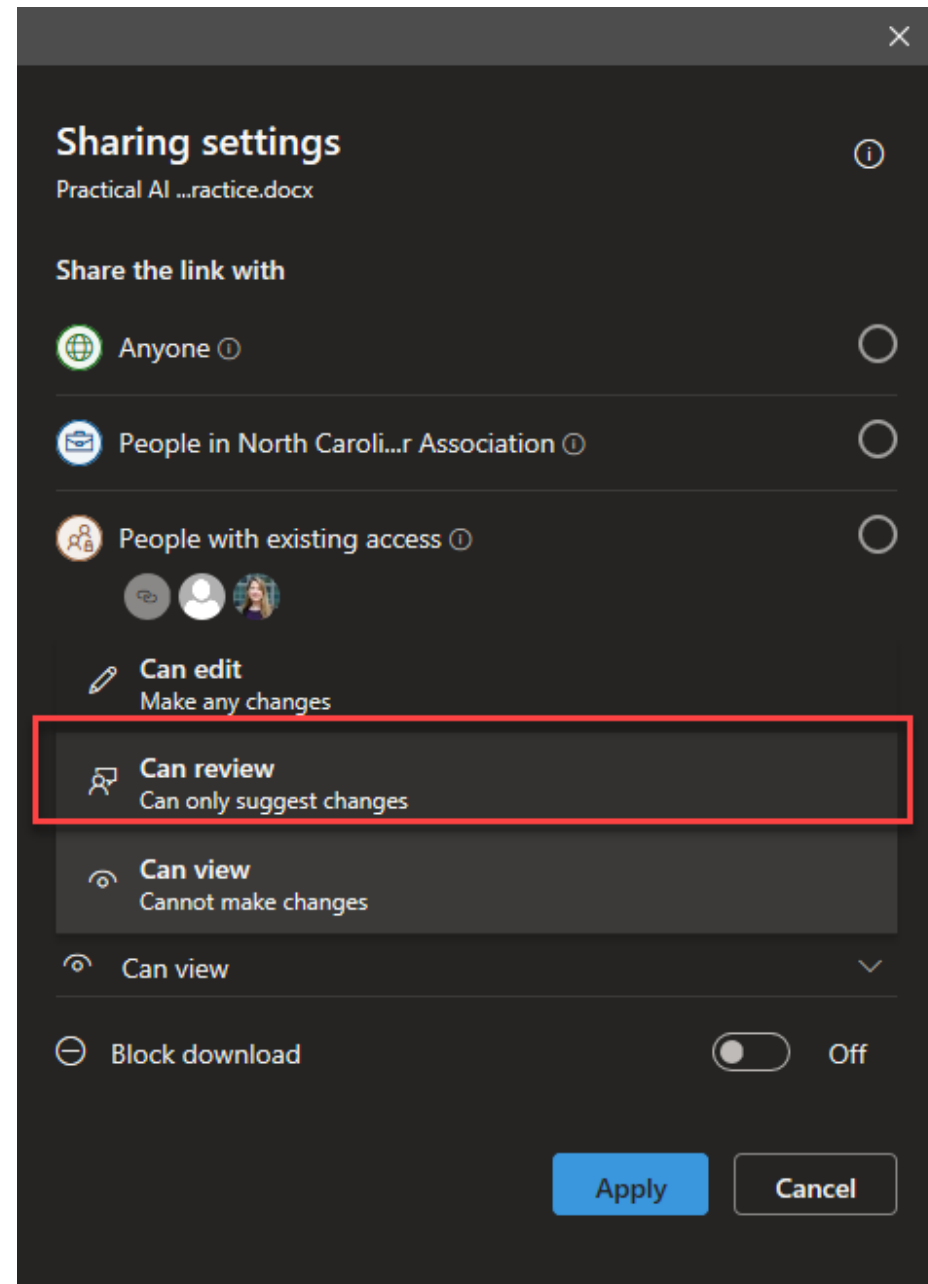
Get Loom for Free



Share a File or Folder



Share a File or Folder



See Who Has Access to the Folder

Files > CPM
selection for all items

	Name ▾	Modified ▾	Modified By ▾	File size ▾	Sharing
	STAMP	August 29, 2019	Catherine Sanders Reach	28 items	Private
	Building a Website	April 25, 2019	Catherine Sanders Reach	21 items	Private
	NCBA Staff Training	April 22, 2019	Catherine Sanders Reach	4 items	Private
	Learning Objectives Webinars	April 17, 2019	Catherine Sanders Reach	21 items	Private
✓	Planning and Administration	March 26, 2019	Catherine Sanders Reach	28 items	Shared
	Tech Consulting	March 12, 2019	Catherine Sanders Reach	22 items	Private


Planning and Administration

Manage Access


Links Giving Access ⓘ [Share](#)


There are no sharing links for this item.

Direct Access ⓘ

 Catherine Sanders Reach
Director of the Center for Practice Manag...

Owner

 Erik Mazzone
Senior Director, Membership Experience

 ▾

Manage Access

Files > CPM > Planning and Administration



Name ▾



Member Discount Provider agrees to.docx

Sharing

Shared

Member Discount Provider agrees to.d... ✕

Manage Access

[Stop sharing](#)



Links Giving Access ⓘ

[Share](#)



<https://ncbar365-my...>

Copy



People you specify can view

This link works for ^



Jennifer Shapiro
Sponsorship Coordinator ✕



Direct Access ⓘ



Catherine Sanders Reach
Director of the Center for Practice Manag...

Owner



Erik Mazzone
Senior Director, Membership Experience



Shared File Intelligence

The screenshot displays a Microsoft OneDrive interface. On the left, a list of files is shown with their respective icons (Word documents, PDFs, and images). The file 'NCAMA 2022 CSR materials.docx' is selected, and its details are shown on the right. The details pane includes the file name, a '22 Views' indicator, a 'See details' link, an 'Inside look' section with a 'Time to read: 28 min' estimate, and a 'Your conversations' section showing a recent email from Emanuel D. McGirt.

File List:

- CITY ATTORNEYS MATTER - LEADING AND ...
- McGirt NCAMA conf. Leadership final.docx
- McGirt NCAMA conf. Leadership final.pdf
- McGirt SOG photo .jpg
- NCAMA 2022 CSR materials.docx
- NCAMA 2022 CSR materials.pdf
- NCAMA 2022 McGirt Reach papers and slid...
- ncama law practice management PP #2.ppt
- ncama law practice management PP Versio...
- ncama law practice management PP Versio...
- ncama law practice management slides.pdf
- ncama law practice management.pptx
- paper #13 Leading and Managing City Atto...
- Planning Notes for Law Office Practice Man...

NCAMA 2022 CSR materials

22 Views

[See details](#)

Inside look ⓘ

⌚ Time to read: 28 min

At a glance

- If you are a MS 365 subscriber and receive the Viva Daily Briefing email or occasionally review Viva Insights, you have probably noticed it is always trying to get you to block time for "focus time".
- Reduce risks associated with poor process documentation, haphazard task management, siloed information, and other issues that plague businesses both large and small.
- The primary issue with DIY file naming conventions is lack of documentation, overly complex structures, and lack of compliance by the file creators.

Your conversations

You, Emanuel D. McGirt
RE: [External] Re: meeting on tomorrow
Hi, I've updated the paper. NCAMA 2022 CSR ...
Jul 13, 2022

2 Viewers · 22 Views

Send Link to Request Files from OneDrive

The screenshot shows the OneDrive web interface. At the top, a toolbar contains buttons for '+ New', 'Share', 'Copy link', 'Request files', 'Download', 'Delete', 'Rename', and 'Automate'. Below the toolbar, the 'My files' section lists several folders: 'Test Folder', 'OfficeMobile', 'Succession Planning NCBA CLE 2021', 'Documents - Document Library to Share in', and 'Email attachments from Power Automate'. A mouse cursor is hovering over the 'Request files' button. Two dialog boxes are overlaid on the interface. The first dialog, titled 'Request files', asks 'What files are you requesting?' and has a text input field containing 'Testing Request Files'. The second dialog, titled 'Send file request', provides a link 'https://ncbar365-my.sharepoint.com/:f:/g/personal/csanc' with a 'Copy link' button, and includes sections for permissions ('Anyone with the link can upload files') and email options ('Or you can send it via email' with fields for 'To: Name, group or email' and 'Message...').

Request files

What files are you requesting?

Testing Request Files

Recipients will see the above request name and

Send file request

Here's the link people can use to upload files

<https://ncbar365-my.sharepoint.com/:f:/g/personal/csanc> **Copy link**

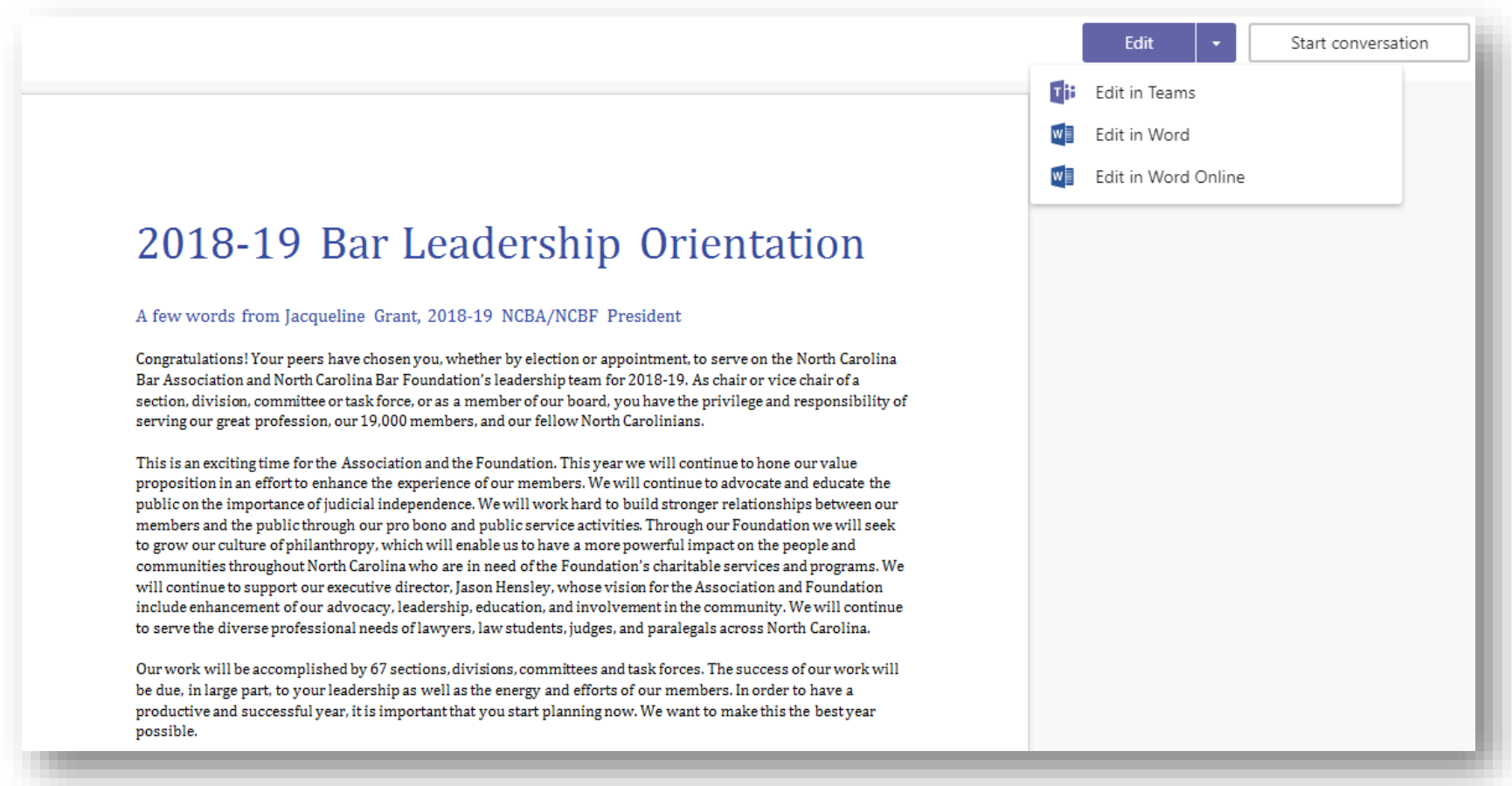
Anyone with the link can upload files

Or you can send it via email

To: Name, group or email

Message...

Multi-Author Document Collaboration



The screenshot displays a document titled "2018-19 Bar Leadership Orientation" in a blue serif font. Below the title, there is a sub-header "A few words from Jacqueline Grant, 2018-19 NCBA/NCBF President" in a smaller blue font. The main body of the document contains three paragraphs of text in a black serif font. On the right side of the document, there is a sidebar with a top bar containing an "Edit" button and a "Start conversation" button. Below this, a dropdown menu is open, showing three options: "Edit in Teams" with a Teams icon, "Edit in Word" with a Word icon, and "Edit in Word Online" with a Word icon.

2018-19 Bar Leadership Orientation

A few words from Jacqueline Grant, 2018-19 NCBA/NCBF President

Congratulations! Your peers have chosen you, whether by election or appointment, to serve on the North Carolina Bar Association and North Carolina Bar Foundation's leadership team for 2018-19. As chair or vice chair of a section, division, committee or task force, or as a member of our board, you have the privilege and responsibility of serving our great profession, our 19,000 members, and our fellow North Carolinians.

This is an exciting time for the Association and the Foundation. This year we will continue to hone our value proposition in an effort to enhance the experience of our members. We will continue to advocate and educate the public on the importance of judicial independence. We will work hard to build stronger relationships between our members and the public through our pro bono and public service activities. Through our Foundation we will seek to grow our culture of philanthropy, which will enable us to have a more powerful impact on the people and communities throughout North Carolina who are in need of the Foundation's charitable services and programs. We will continue to support our executive director, Jason Hensley, whose vision for the Association and Foundation include enhancement of our advocacy, leadership, education, and involvement in the community. We will continue to serve the diverse professional needs of lawyers, law students, judges, and paralegals across North Carolina.

Our work will be accomplished by 67 sections, divisions, committees and task forces. The success of our work will be due, in large part, to your leadership as well as the energy and efforts of our members. In order to have a productive and successful year, it is important that you start planning now. We want to make this the best year possible.

Office 365 Materials.docx - Last Modified: Yesterday at 9:23 AM

Version History

File Name
Office 365 Materials.docx

Location
Small Firm 2020 Conference
OneDrive - North Carolina Bar Association »...

Version History

Yesterday, April 21, 2020		
	Modified by: Catherine Sanders Reach	9:23 AM

April 20, 2020		
	Modified by: Catherine Sanders Reach	4:49 PM
	Open version	
	Modified by: Catherine Sanders Reach	4:36 PM
	Open version	
	Modified by: Catherine Sanders Reach	4:24 PM
	Open version	
	Modified by: Catherine Sanders Reach	4:14 PM
	Open version	
	Modified by: Catherine Sanders Reach	4:02 PM
	Open version	
	Modified by: Catherine Sanders Reach	3:52 PM
	Open version	

Share Comments

Send Link

Office 365 Materials.docx

People you specify can view >

Enter a name or email address

Add a message (optional)

Send

Word Document
PDF

Send a Copy

Search or type a command

Recent Contacts

Recent

12:05 PM
You: Easiest is a spreadsheet templat...

12/21
Jeremy and Lindsey
Lindsey: Sounds good to me -- thanks!

12/21
JW
You: I am in my office. I've got a call ...

12/20
10-4 thanks

12/20
Erik, Jeremy, and Mark
You: Thanks. Going to hunt.

JS
You: Yeah! Thanks.

12/18
Haha, OK -- I am free now

12/17
You: Erik said to use his old Office to...

12/7
Lindsey and Mark
You: That's a danger 😊 I'm out!

Suggested

AN

8-72

Conversation Files Organization Activity +

Great! BTW, you've already sent me a quarterly report for CPM right? Even though you were only here for 2/3 of a quarter

Rocking and rolling over there

9:27 AM
I sent you a report, I'll resend and see what you think, what you

9:27 AM
Ok thank you

11:53 AM
Hey - I'm going to need for sections folks to start tracking their time spent on each section. What would you recommend for that in terms of a tool?

12:05 PM
Easiest is a spreadsheet template. in Excel <https://templates.office.com/Weekly-time-sheet-by-client-and-project-TM06088884> or Google <https://trackingtime.co/time-tracking-for-google-sheets> or a free <https://clockify.me/>

Weekly time sheet by client and project
Employees whose time is billed directly to client should complete this time sheet each week. The

templates.office.com

Type a new message

📎 📎 😊 📄 🗨️ ⋮

MS Teams – Chat, Calls, Video Conference, Files, Collaboration

Reply All w Atts

Share to Teams

Quick Steps

Move

Tags

Editing

Immersive

Translate

Zoom

Reply with Scheduling Poll

Find Time

Share to Teams

Share to Microsoft Teams

Share to

Type the name of a person, group, or channel

Participants from email

KL Kate Leahy

Frequently shared to

General
Design Your Law Practice: A Practical Guide to Design Thinking for Lawyers Looking to Getting Things Done

VT General
VSB TECHSHOW 2022 - Tech to Succeed

Recent locations

Amy, Cheyenne, and Erin

This sounds like a really good session! Please let me know how I can help.

Sarah Saint

☐ Include attachments

Share

Send Email to Teams Channels

Teams



CA

General

Posts

Files

Planning Notes ▾

CPM Projects

CPM Calendar

Client Ticketing



Your teams

M	MX Dept	...
	General	
	Membership Appreciation Month	
SM	Social Media	...
CA	CPM Admin	...
	General	
	Learning Objectives	
US	Updating SLORM (Small Law Office Re...	...
WR	Website Redesign	...
	General	
	1 hidden channel	

Hidden teams



CPM Projects 2019-... ...

STAMP ...

Webinars ...

1. Learning Objectives ...

2. NonCLE focused on ...

3. LP Magazine Hot Bu...

Recorded CLE ideas ...

CSR Travel ...

CPM Conferences 2... ...

Learning Objectives series (3rd Wed at noon)

Learning Objectives: Defensive Calendaring (May 15 12-12:45)

Event ID: CPMW052019 <https://ncbar.zoom.us/j/6753562861>

Does your calendar feel like it is under constant attack? Is managing meetings, events, client consultations and to-dos overwhelming? Do you know how to effectively leverage electronic calendars such as Google Calendar or Microsoft Outlook to block and tackle for time? Come to this session to learn some defensive calendaring techniques and tips to effectively coordinate meetings with multiple people, allow people to self schedule and leverage artificial intelligence to help you get out of the business of negotiating availability.

https://crm.ncbar.org/eweb/DynamicPage.aspx?webcode=EventInfo®_evt_key=667D3ABA-AB1F-453F-87E9-5EDB38111168&RegPath=EventRegNoFees

Learning Objectives: Outlook Tips and Add-ons (June 19 12 -12:45)

Event ID: CPMW062019 <https://ncbar.zoom.us/j/6753562861>

MS Outlook is the top email application for business use. It is an incredibly powerful product but like many powerful applications most users only know how to leverage a small fraction of it's power. In this session we'll look at not only native features and functions that will help manage email more effectively but we'll also look at some add ons that will super power Outlook for communication and collaboration.

https://crm.ncbar.org/eweb/DynamicPage.aspx?webcode=EventInfo®_evt_key=1DDDDCF7-ECC6-45C1-8148-7772CAF9BDE5&RegPath=EventRegNoFees

Learning Objectives: Encryption at Rest and in Transit (July 24 12 -12:45)

Event ID: CPMW072019 <https://ncbar.zoom.us/j/6753562861>

Whether third party encryption or setting built into the technology you use every day there are a number of ways to encrypt emails and their attachments. Why do you need to encrypt them? Here are a few scenarios: You are a real estate attorney under constant thread of wire fraud and man in the middle attacks; you are a family law attorney with an enraged spouse potentially between your emails and your client; you don't know whether your client is reading the email on a corporate device that by policy brings into question the privilege of the email; you are emailing patent specifications; you are representing a government whistleblower and the list goes on. The question is when do you NOT need to encrypt emails and securely send documents to clients. We will look at a variety of ways to easily and efficiently get this done.

https://crm.ncbar.org/eweb/DynamicPage.aspx?webcode=EventInfo®_evt_key=9203DBD1-044A-4539-8D7F-

Teams



General

Posts

Files

Planning Notes

CPM Projects

CPM Calendar

Client Ticketing



Your teams

MX Dept

...

General

Membership Appreciation Month

Social Media

...

CPM Admin

...

General

Learning Objectives

Updating SLORM (Small Law Office Re...

...

Website Redesign

...

General

1 hidden channel

Hidden teams

Board

Charts

Schedule

To do

+ Add task

☐ Send Larry a thank you

04/17 0/2

Catherine Sanders Reach

☐ Learning Objectives: Tasks

- ☐ Post registration link
- ☐ Prepare materials and demos
- ☐ Send reminder to registrants
- ☐ Give presentation
- ☐ Produce recording
- ☐ Send link to recording to Jeremy
- ☐ Send link and follow up to attendees

! 04/15 0/7

Catherine Sanders Reach

☐ Write article on ToDo from Planner

03/24

Catherine Sanders Reach

Doing

+ Add task

☐ Contact client for spouse name

- ☐ Contact client
- ☐ Sdd name to database
- ☐ finalize billing record

05/04 0/3

Catherine Sanders Reach

Done

Add new bucket

+ Add task

Hide completed 3

Test Task

10/10/2019

Completed by Catherine Sanders...

finalize video

03/23

Completed by Catherine Sanders...

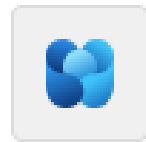
Go to trader joes

02/22 3/3

Completed by Catherine Sanders...



Website

Tasks by
Planner andChannel
calendar

Viva Engage



Wiki



Lists



Word



OneNote



Clio



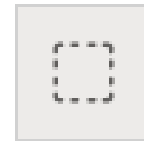
Stream



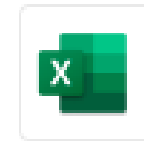
Whiteboard



PDF

Document
Library

Visio



Excel



PowerPoint

Power
Automate

Asana

SharePoint
Pages

SharePoint



Forms



Power BI



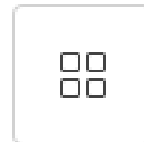
Trello



Power Apps



Evernote



See less

[+ Create site](#) [+ Create news post](#)

Following



Test for Georgia



NCCU Clinics - Ben



Firm Intranet



Sharepoint Library for test



CPM Admin - test private

[See all](#)

Recent



Teamsite Demo



CPM Admin



Design Your Law Practice: A ...



City of Raleigh



Shared Library Site

[See all](#)

Frequent sites

[See all](#)

TD

**Teamsite Demo**
GroupYou viewed business intellig...al
- cc update on 4/17/2023You viewed 2020 Tips for ARAG
on 8/1/2022**Design Your Law Practice: A
Practical...**
GroupYou viewed Design book
contr...ation updated on
2/15/2023You viewed Design Your Law
- perlis on 1/23/2023
You viewed Sample Template on
2022

CR

**City of Raleigh**
Group

There's no recent activity on this site.

CA

**CPM Admin**
GroupYou viewed CPM Strategic
Pla...otes with Erik on 2/15/2023You viewed Catherine Sanders
...ail signatures on 3/9/2022You viewed Today we are talk...o
OBA Members! on 5/21/2021

SL

**Shared Library Site**
GroupYou viewed Sample Template on
12/22/2022You viewed brief template on
12/22/2022**Catherine Sanders R...**
Director of the Center for Practice ...
Membership

Update your profile



VS

VS
**TECHSHOW 2022 - Tech
to Succeed**
GroupYou viewed Tech and Ethics for
Duke Handout on 11/3/2022You viewed VSB Current
Techn...an updates (1) on
4/25/2022You viewed Brainstorming on
4/25/2022

VS

**Recruiting + Retention for
ABA TECHSH...**
GroupYou viewed PPT Outline on
9/14/2022You viewed Recruiting +
Team...wth Strategies on
4/21/2022You viewed ABA TechShow EQ
Over IQ Materials on 3/18/2022

NC

**North Carolina Bar
Association Team Site**You viewed Tools to Manage
Tasks in Office 365 on 7/9/2021You viewed Backup Strategies
paper on 7/9/2021

TP

**Test Plan for Article**
Group

There's no recent activity on this site.

CA

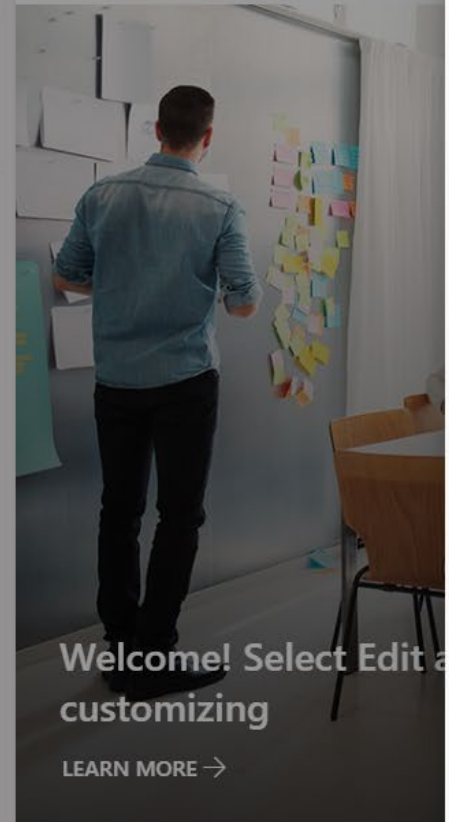
**CPM Admin - Tips Tips Tips**You viewed Tips Spreadsheet on
6/14/2022You viewed 2021 Practice
Managem...s & Apps_final on
2/24/2021

NP

**NCBF Project Plan in Teams**
Group

TT

**Test Team for Advanced
Teams Tips**
Group



Preview and apply template

From Microsoft

Organization home

Provide the online home for your organization with news, resources, and personalized content.

Site capabilities

- Highlight news and conversations
- Showcase organization resources
- Emphasize organizational values and culture
- Provide easy access to popular portals

Preview site full screen

Existing pages, libraries, and lists can still be accessed in Site contents. Any content added by a template can be edited or deleted later. [Learn more](#)

Location	Time	Day
Redmond, WA	7:06 PM	Sunday, 02/16/2023
Singapore, Singapore	11:06 AM	Talk ahead Monday, 02/13/2023
Dubai	4:06 AM	Talk ahead Monday, 02/13/2023
Sao Paulo	11:06 AM	Talk ahead Monday, 02/13/2023

Back

Use template

Cancel

+ Add

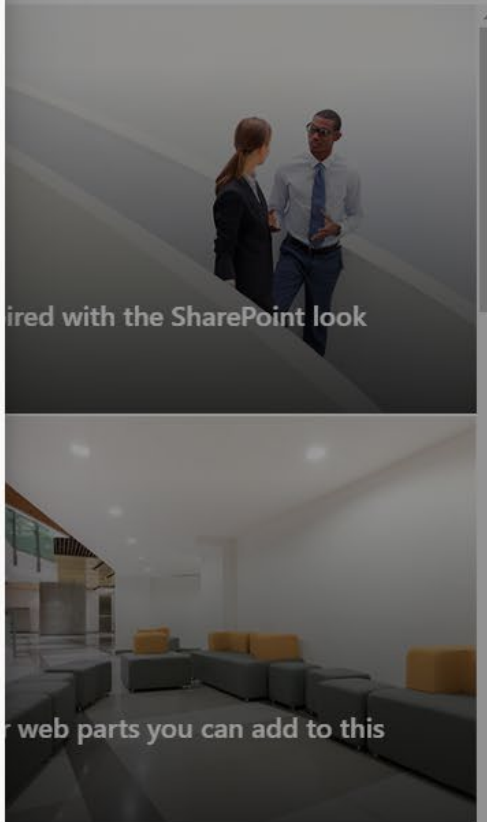
+ Add News

Create a news post

Keep your audience engaged by sharing your latest...

Title of news post

Preview that shows the first few lines of the article.





Security

AI in AntiVirus / Malware Protection

- Carbon Black
- Deep Instinct
- Total AV
- Legacy Applications
 - Malwarebytes, Norton, McAfee,
 - Windows Defender, AVG



Why is AI-based Antivirus Better?

- Enhanced Detection & Adaptability
- Real-Time Detection
- Reduced False Positives
- Continuous Learning
- Proactive/Predictive





High-Profile Skadden Litigator Goofs, Sends Private E-mail to Reporters

Posted Feb 21, 2008, 08:03 am CDT

T

February 5, 2008, 5:42 pm

Report: Lawyer's Email Slip-up Leads to Zyprexa Leak

Posted by Dan Slater

Oops. Former bar prez copies top court on email about its 'ill-conceived and uninformed questions'

POSTED OCT 09, 2013 05:30 PM CDT

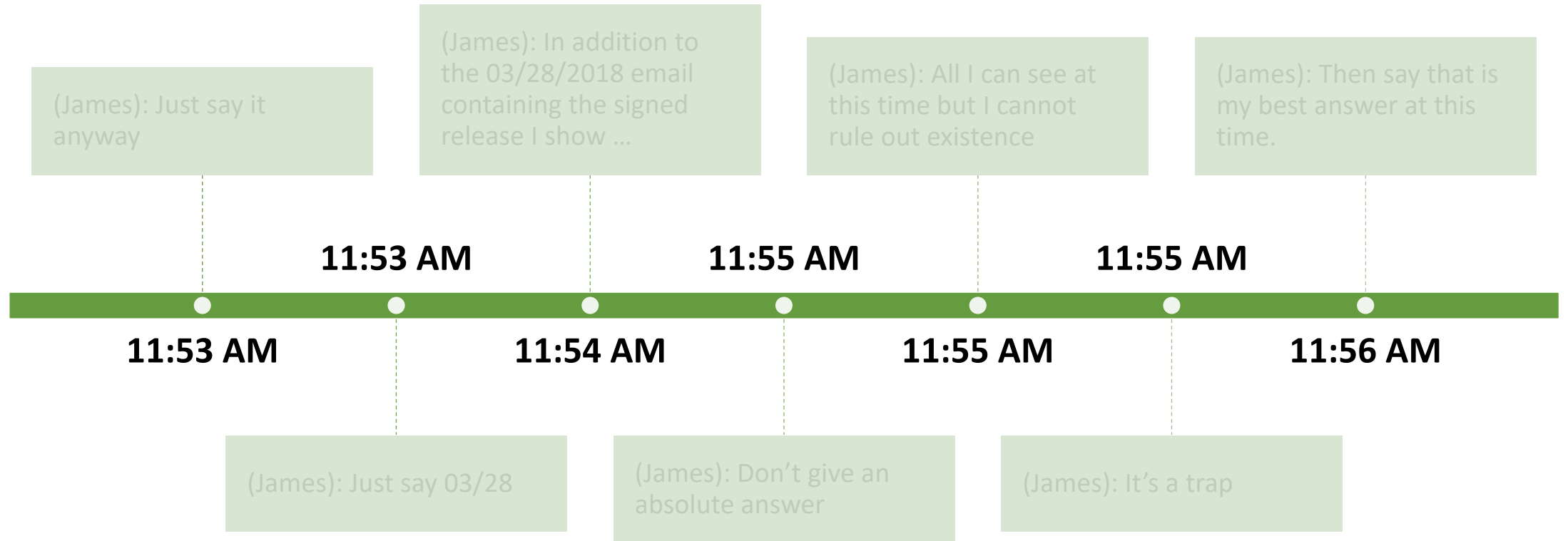
Email is (Still) the Most Dangerous Tool You Use Every Day

Ex-DLA Piper partner caught in 'churn that bill, baby!' crossfire sues firm's counsel

BY MARTHA NEIL

POSTED MARCH 24, 2016, 12:15 PM CDT

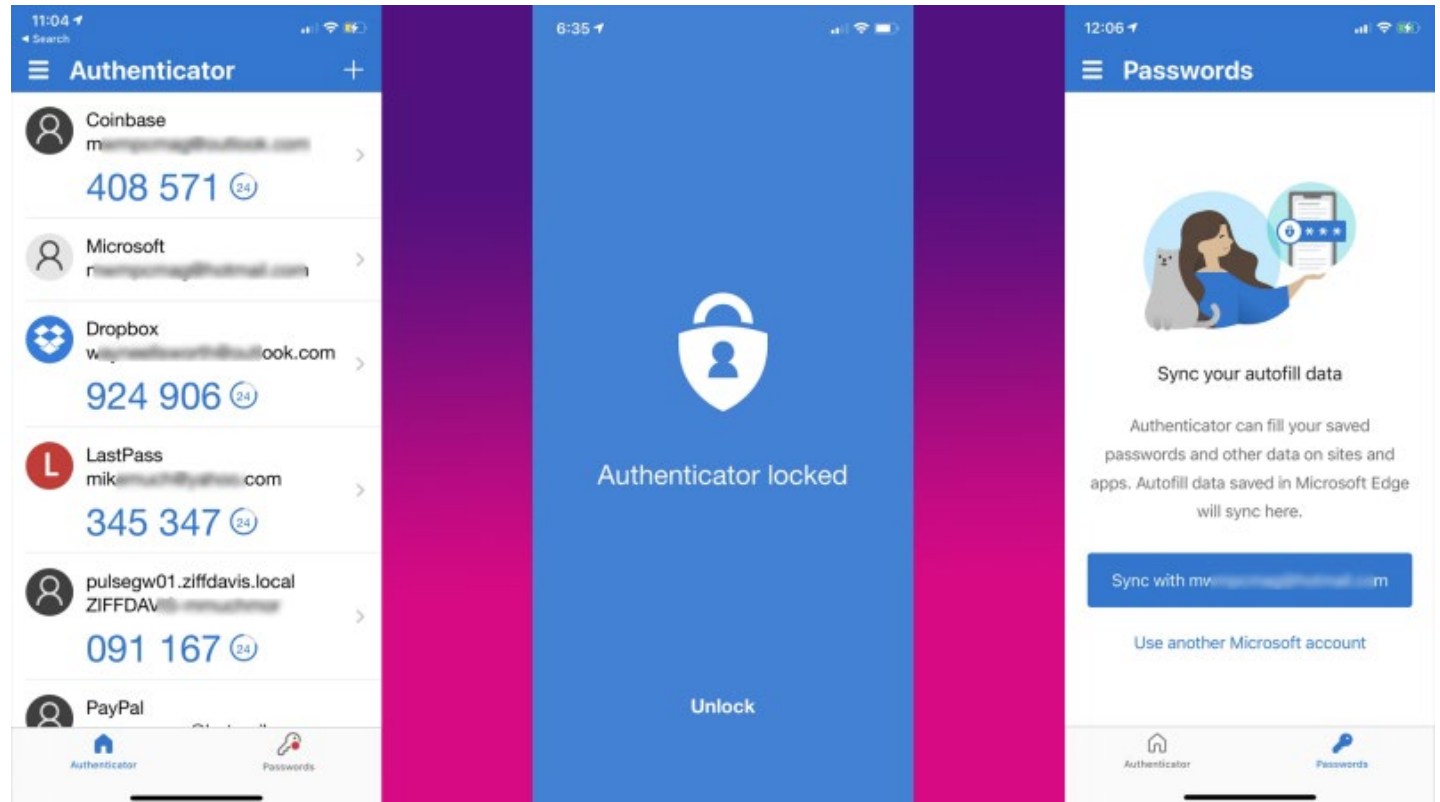
Suspended For Texting Witness During Deposition





Phishing Isn't Just for Emails

Use An
Authenticator
App Instead of
SMS




Transmitting Electronic Files



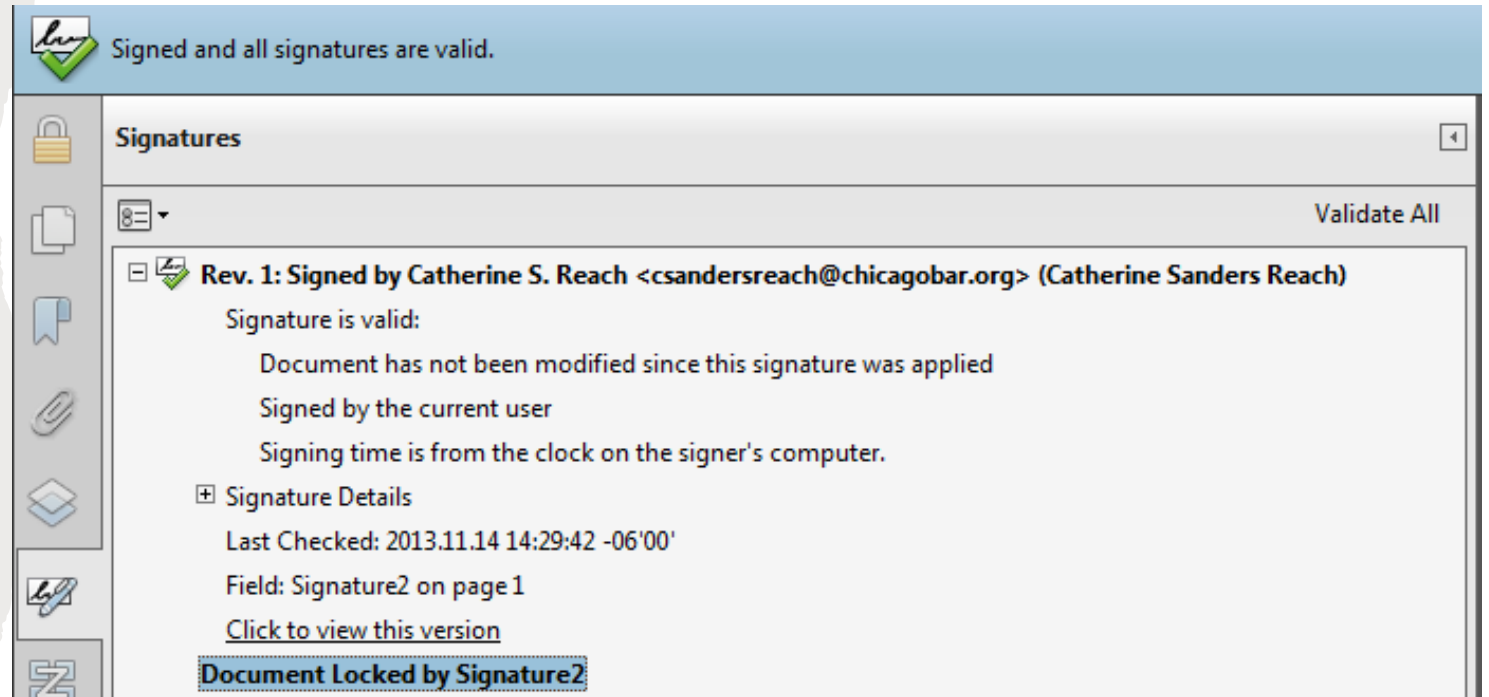
Alex Jones lawyer suspended 6 months over records release

By DAVE COLLINS January 6, 2023



Transmitting Electronic Files

- Know what you are sending
- Password protection
- Encryption
- Send links instead of attachments
- Use a client portal



Passwords

FIDO Authentication A Passwordless Vision



Develop an
Effective &
Reliable Approach
to Patching Your
System



PATCH



Encrypt All Mobile Devices and Portable Storage

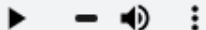
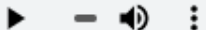
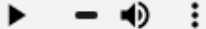
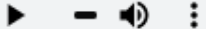
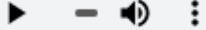
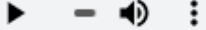
A person is sitting in a room, wearing a large, knitted hat with orange and white stripes. The hat covers their head and ears, leaving only their face visible. They are wearing a light-colored t-shirt. In the background, there is a whiteboard on a stand and a microphone on a stand. The room appears to be a classroom or a meeting room.

Who is Listening? Who is Watching?

John Oliver marries a cabbage. You're welcome.



VALL-E

Text	Speaker Prompt	VALL-E
The others resented postponement, but it was just his scruples that charmed me.		
		
		





Thank You

Paul J. Unger | punger@affinityconsulting.com

Catherine Sanders Reach | csandersreach@ncbar.org



Law Society
of Ontario

Barreau
de l'Ontario

TAB 9

17th Solo and Small Firm Conference: Secrets for Success

Rebooting Your Client Intake Process

Lisa Feldstein

Lisa Feldstein Law Office Professional Corporation

Jennifer Reynolds

Fresh Legal

June 8, 2023



REBOOTING YOUR INTAKE PROCESS

17th Solo and Small Firm Conference
Thursday, June 8, 2023
Law Society of Ontario

Lisa Feldstein, BA, JD
Jennifer Reynolds, BSc, LLB

1

Presenters

Lisa Feldstein
BA, JD
Lisa Feldstein Law Office PC
@lisafeldstein

Jennifer Reynolds
BSc, LLB
Fresh Legal
@FreshStartOtt

2

Agenda

- Why is an intake process important?
- What makes a good intake process?
- How can a good intake process help you meet LSO client identification requirements?
- Why should you qualify clients early in your process (and how do we do it)?
- What tools/software can be used to improve your intake processes?

#17SoloSmall

@lisafeldstein

@FreshStartOtt

3

Why is an intake process important?



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4


What makes a good intake process?



Filtering/
qualifying



Standards for
responding



Easy tools &
automation



Track and
follow up
with leads



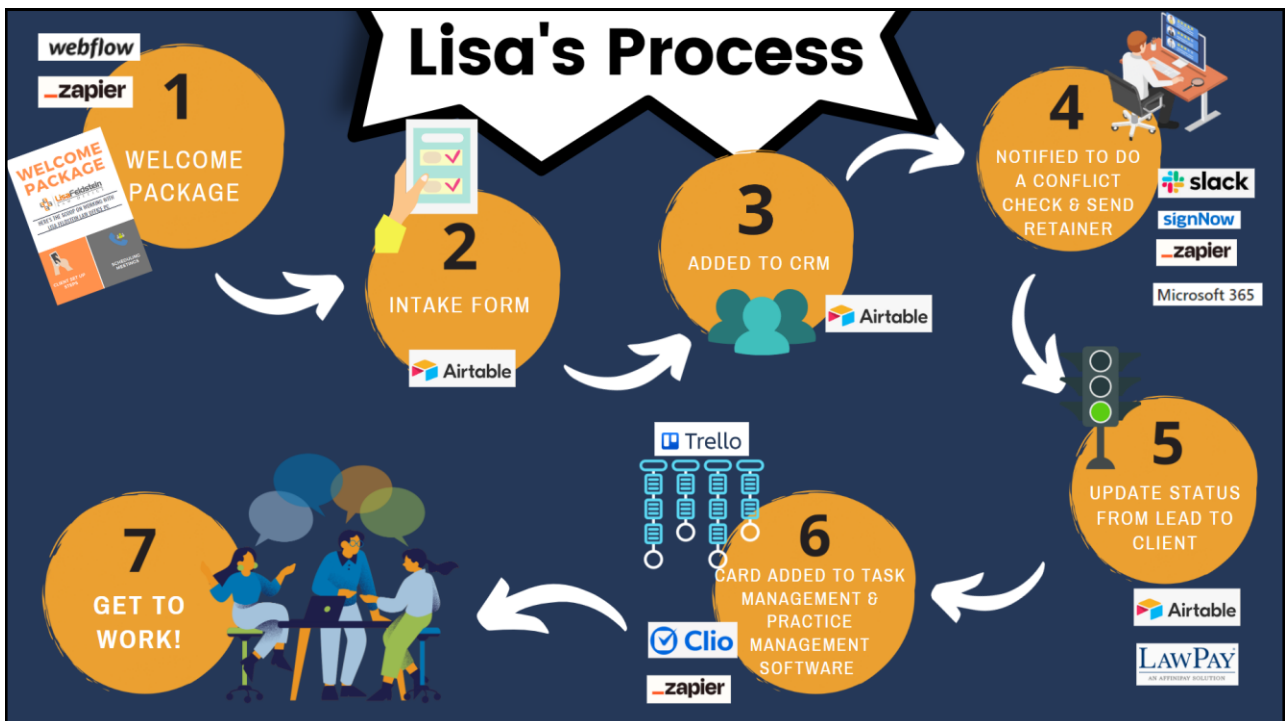
Build trust
and provide
value

#17SoloSmall

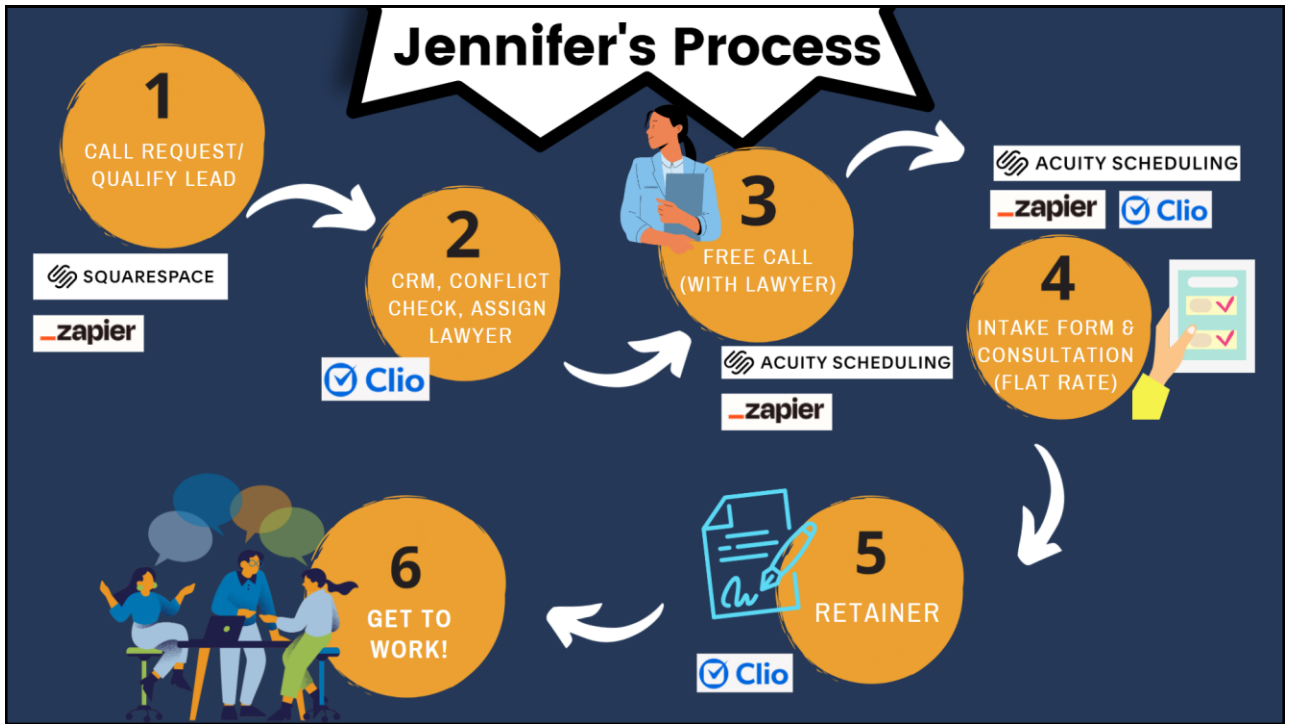
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7



8

Filtering/qualifying clients



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9

What tools/software can be used?



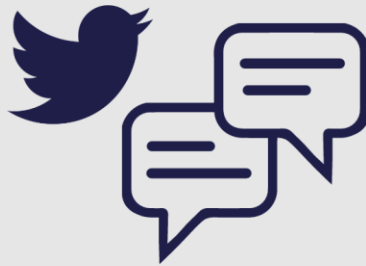
#17SoloSmall

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@FreshStartOtt

10

**What is YOUR next action item?
Share it with the person beside you or
on Twitter using #17SoloSmall!**



#17SoloSmall

@lisafeldstein

@FreshStartOtt





Identifying and Rebooting Your Intake Process

Initial Client Contact



How is the potential client reaching out to your firm?

- ☐ Chatbot
- ☐ Text message
- ☐ Email
- ☐ Phone call
- ☐ Social media (ie. Instagram, TikTok, LinkedIn)
- ☐ Other:

Who is accountable for receiving the inquiry?

- ☐ My assistant
- ☐ Another lawyer at the firm
- ☐ I do it myself
- ☐ Other:

Is there a standard for how and when to respond?

- ☐ Yes
- ☐ No

If no, what standards would you like to see in place?



Filtering Clients

Do you filter out leads that are not a good fit **before they speak with a lawyer?**

- ☐ Yes
- ☐ No

If yes, how do you do it?

- ☐ Outline areas of practice on website
- ☐ Standard questions on a form
- ☐ Standard questions in call with assistant
- ☐ Other:

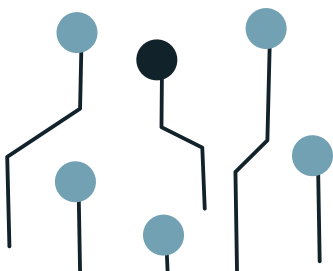
If no, how might you start to filter your leads?



Do you ever take on clients and realize they are not a good fit **after they sign the retainer?**

- ☐ Yes
- ☐ No

If yes, what factors indicate they are not a good fit?



What questions could you ask to identify these factors before you speak with the client?

What kind of questions do you ask yourself about every single client before you agree to represent them?

Could you standardize or automate these questions?



Creating Value During the Intake Process

What questions do you answer over and over?

Can you provide that information to your clients up front and systematically? *Consider auto-replies, handouts/PDFs, links to useful resources, FAQ*



Client Identification

Are you collecting the required intake information set by the Law Society of Ontario for every client?

- ☐ Yes
- ☐ No
- ☐ I don't know



If you aren't sure, refer to By-Law 7.1 at the back of this workbook.

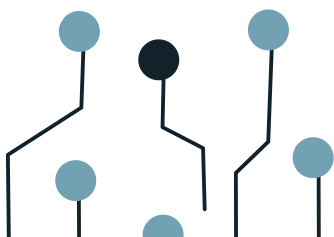
If yes, how and when do you collect it?

Is it the same person or process/tool every time?

- ☐ Yes
- ☐ No (If so, could it be?)

If no, what information do you still need to collect?

When in your process will you collect it?



Conflict Checks

Do you do a conflict check before a potential client speaks to a lawyer?

- ☐ Yes
- ☐ No

If no, when do you do your conflict check?

Who is responsible for the conflict check?

Is it the same person every time?

- ☐ Yes
- ☐ No

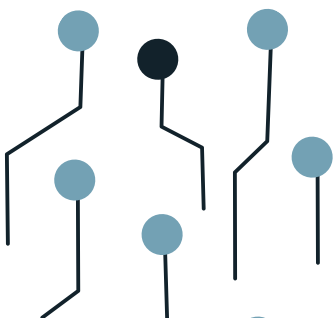
If no, could it be?

How do you do your conflict check?

- ☐ CRM software
- ☐ Practice management software
- ☐ Other:

Where is the information recorded?

- ☐ CRM software
- ☐ Practice management software
- ☐ Other:



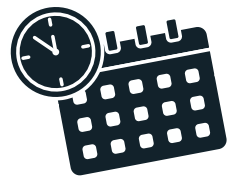
Appointment Booking

Are you making promises (e.g. about how quickly leads will get an appointment with a lawyer)?

- ☐ Yes
- ☐ No

If yes, are you tracking and monitoring to ensure you are keeping your promises?

- ☐ Yes
- ☐ No



If no, what action steps will you take to monitor it?

How do clients schedule **initial appointments**?

- ☐ Send them our calendar booking link
- ☐ Directly book from our website
- ☐ Manually book the appointment ourselves
- ☐ Other:

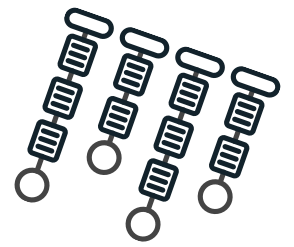
If they are manually booked, is it the same person booking it every time?

- ☐ Yes
- ☐ No

If no, could it be?



Tracking and Converting Leads



Do you track each lead that contacts your firm? If yes, how?

- ☐ CRM
- ☐ Excel spreadsheet
- ☐ Other:

If yes, what information do you gather?

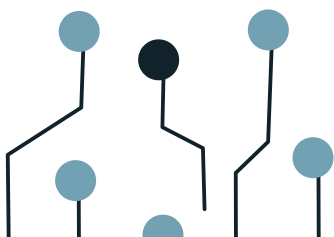
- ☐ Name
- ☐ Phone number
- ☐ Email address
- ☐ Conflict information
- ☐ Other:

If no, how could you track leads and what information will you track about them?

Do you follow up with potential leads?

- ☐ After initial contact (once)
- ☐ After initial contact (more than once)
- ☐ After consultation before retainer (once)
- ☐ After consultation (more than once)
- ☐ Not at all
- ☐ Other:

If not at all, where could follow ups be added to your system? What tools could you use to follow up?



Retainers and Non-Engagement Letters



Does **every client** sign a retainer agreement?

☐ Yes

☐ No

If yes, is the retainer agreement and the process of sending it to the client standardized? Does the same person do it every time?

If no, where will you add this to your process? How will you ensure it is done? Who be responsible for it?

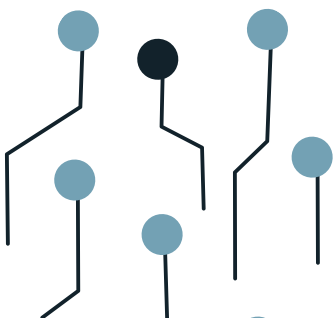
Do you send **non-engagement** letters?

☐ Yes

☐ No

☐ Sometimes

If no or sometimes, where could you add this to your process?



Automation

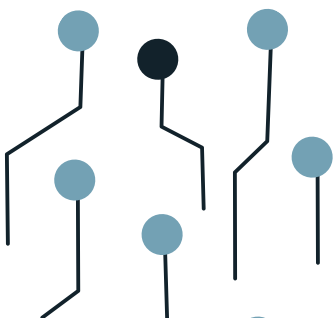


What tasks, if any, in your intake process do you dislike when you do them because they are repetitive or feel like a waste of your time?

What tools have you heard of that you could use to automate these tasks?

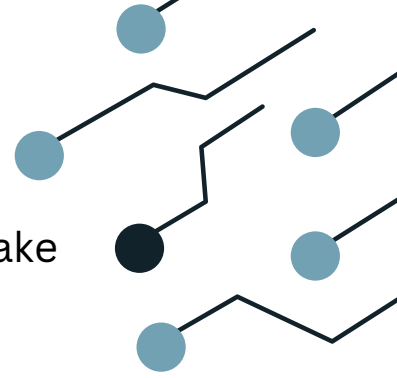
- ☐ Clio (Manage/Grow)
- ☐ Zapier
- ☐ Acuity
- ☐ Airtable
- ☐ SignNow
- ☐ Trello
- ☐ Other:

How could you learn more about these tools?



YOUR REBOOT PLAN

Commit now to doing three things to improve your intake process. What will you do? When will you do it?
Tell someone in the workshop or online.



1

2

3

QUALIFYING QUESTIONS



Name / Email address / Phone Number

May we leave you a message at the phone number provided?

Where do you live? (Website note tells them we only serve clients in the Province of Ontario.)

What is your spouse/former spouse's name? *Conflict check (Website note explains how this information is used.)

Are you looking for a lawyer or a mediator?

Were you referred to a particular member of our team?

Are you applying for legal aid funding?

Please tell us a bit about your situation.

EMAIL TEMPLATES



After Initial Call (same day):

Hello [name]:

I am writing to follow up on our telephone call. It was a pleasure to speak with you and I hope you found the information you received during our conversation helpful.

Do you have any follow-up questions, or things you forgot to ask?

We find that often people think of things they want to or meant to ask us after the telephone call is over. If you think of anything, please do not hesitate to contact us. We would be happy to help.

What happens next? Book your consultation or intake meeting now.

If you have not done so already and are ready for the next step, please book a consultation or intake meeting with me at a time that works for you [using this link](#).

Important: Until you have a signed retainer with us and have paid the required deposit, we will not take any action on your file. If you have any questions about this, please do not hesitate to contact me.

Take care,

[lawyer name]

EMAIL TEMPLATES



After Initial Call (seven days later if consultation not booked)

Hello [name]:

We are writing to follow up on your telephone conversation with [lawyer] on [date]. If you would like to book an initial meeting with [lawyer], please [use this link](#) to schedule a time that works for you.

Important: Until you have a signed retainer with us and have paid the required deposit, we will not take any action on your file. If you have any questions about this, please do not hesitate to contact our office.

Take care,

[Firm Name]

One Week After Consult (if not retained):

Hi [First Name],

We are writing to follow up on your consultation with [lawyer] on [date]. If you wish to retain [lawyer] to assist with your matter, please contact them directly or reply to this email.

Please note, as a reminder, until you have a signed retainer with us and have paid the required deposit, we will not take any action on your file.

If you have any questions about how we can assist in your matter, please do not hesitate to contact our office.

Thank you,

[Firm Name]

EMAIL TEMPLATES



After Initial Call (seven days later if consultation not booked)

Hello [name]:

We are writing to follow up on your telephone conversation with [lawyer] on [date]. If you would like to book an initial meeting with [lawyer], please [use this link](#) to schedule a time that works for you.

Important: Until you have a signed retainer with us and have paid the required deposit, we will not take any action on your file. If you have any questions about this, please do not hesitate to contact our office.

Take care,

[Firm Name]

One Week After Consult (if not retained):

Hi [First Name],

We are writing to follow up on your consultation with [lawyer] on [date]. If you wish to retain [lawyer] to assist with your matter, please contact them directly or reply to this email.

Please note, as a reminder, until you have a signed retainer with us and have paid the required deposit, we will not take any action on your file.

If you have any questions about how we can assist in your matter, please do not hesitate to contact our office.

Thank you,

[Firm Name]

EMAIL TEMPLATES



Sending Retainer Agreement

Hello [First Name],

Thank you for choosing [Firm Name]!

There are three simple steps to complete so we can begin working with you:

Step 1: Review our [office policies](#). If you have any questions or concerns regarding these policies, please let us know.

Step 2: Please review and sign the retainer agreement. Click the link below to complete this step. You can do this from your phone or computer. **This link is valid for one week.**

Step 3: You will receive an emailed invoice for the deposit. You can pay this deposit via email transfer, credit card, cash or cheque. If you are paying by credit card, there is a link in the emailed invoice. To pay by email transfer, please send the payment to office@freshlegal.ca and set the password as the first name of your lawyer. To pay by cash or cheque, please contact our office.

Please do not hesitate to call or email if you have any questions or concerns. We look forward to assisting you with this matter.

Take care,

[Firm Name]

EMAIL TEMPLATES



Four Weeks After Consultation (if not retained)

Hi [First Name],

We are writing to follow up on your meeting with [lawyer] on [date].

As to today's date, you have not retained [lawyer] and they do not represent you in your matter. As such, they will not take any action with respect to your matter.

Please note that limitation periods may exist with respect to your matter. A limitation period is a deadline by which you need to make a claim. You should seek legal advice if you are concerned about these time limits, and ensure you take action prior to the expiry of the limitation period.

If your circumstances change and you wish to retain our firm with respect to this matter, or if we can be of any assistance to you in the future, please do not hesitate to contact us.

Thank you,

[Firm Name]

An abstract graphic featuring several blue circles and one black circle, connected by black lines that form a network or circuit-like structure. The lines are of varying lengths and angles, creating a dynamic, interconnected pattern.

[illegible]

An abstract graphic featuring several blue circles and one black circle, connected by thin black lines that form a network or path across the page.

[illegible]

An abstract graphic featuring several blue circles and one black circle, connected by black lines that form a network or circuit-like structure. The lines are of varying lengths and angles, creating a dynamic, interconnected pattern. The circles are solid and have a slight shadow, giving them a three-dimensional appearance. The overall composition is minimalist and modern, with a focus on geometric shapes and their relationships.

[illegible]

Law Society of Ontario

By-Law 7.1

Client identification

23. (1) When a licensee is retained to provide her or his professional services to a client, the licensee shall obtain the following information about the client:

1. The client's full name.
2. The client's business address and business telephone number, if applicable.
3. If the client is an individual, the client's home address and home telephone number.
4. If the client is an organization, other than a financial institution, public body or reporting issuer, the organization's incorporation or business identification number and the place of issue of its incorporation or business identification number, if applicable.
5. If the client is an individual, the client's occupation or occupations.
6. If the client is an organization, other than a financial institution, public body or reporting issuer, the general nature of the type of business or businesses or activity or activities engaged in by the client, if applicable.
7. If the client is an organization, the name, position and contact information for each individual who is authorized to give instructions with respect to the matter for which the licensee is retained.
8. If the client is acting for or representing a third party, information about the third party as set out in paragraphs 1 to 7, as applicable.

Additional client identification: activities mentioned in clause 22 (1) (b)

(2) When a licensee is engaged in the activities described in clause 22 (1) (b), in addition to complying with the client identification requirements set out in subsection (1), the licensee shall obtain from the client information about the source of the funds being received, paid or transferred.

Additional client identification when organization involved: activities mentioned in clause 22 (1) (b)

(2.1) When a licensee is engaged in the activities described in clause 22 (1) (b) and the client or third party that the client is acting for or representing is an organization, in addition to complying with the client identification requirements set out in subsections (1) and (2), the licensee shall,

(a) obtain the name of each director of the organization, other than an organization that is a securities dealer; and

(b) make reasonable efforts to obtain,

(i) the names and addresses of the persons who own, directly or indirectly, twenty-five percent or more of the organization or of the shares of the organization, if applicable,

(ii) the names and addresses of all trustees and all known beneficiaries and settlors of the trust, if applicable, and

(iii) information establishing the ownership, control and structure of the organization.

Alternate requirement when unable to meet identification and other requirements re organization
(2.2) If a licensee is unable to obtain the information mentioned in subsection (2.1) or to confirm the accuracy of the information as required by subsection (12.2), the licensee shall,

- (a) take reasonable measures to identify the most senior managing officer of the organization;
- (b) determine whether the client's information in respect of their activities and the source of the funds and the client's instructions in respect of the transaction are consistent with the purpose of the retainer and the information obtained about the client as required under subsection (2.1) and record the results of the determination and the date on which it was made; and
- (c) assess whether there is a risk that the licensee may be assisting in or encouraging fraud or other illegal conduct and record the results of the assessment and the date on which it was made.

Client identification: identification by others in licensee's firm

(2.3) A licensee complies with the identification requirements set out in subsections (1) to (2.2) if an employee of the licensee's firm or another licensee who practises law or provides legal services through the licensee's firm, acting on behalf of the licensee, complies with the requirements.

Timing of verification, individuals

(5) A licensee shall verify the identity of an individual mentioned in subsection (1), including an individual mentioned in paragraph (1) 7, immediately after first engaging in the activities described in clause 22 (1) (b).

Timing of verification: organizations

(6) A licensee shall verify the identity of an organization mentioned in subsection (1) immediately and, in all cases, by not later than 30 days after first engaging in the activities described in clause 22 (1) (b).

Documents, data and information for verification

(7) Subject to subsection (8), the following are the documents, data and information for the purposes of subsection (4):

1. If the client or third party is an individual,
 - i. a government issued photo identification document, excluding a document that is issued by a municipal government,
 - ii. information in the individual's credit file that is located in Canada and has been in existence for at least three years,
 - iii. any two of the following pieces of information, each from a different source that is not the individual, the licensee or an individual acting on behalf of the licensee pursuant to subsection (11),
 - A. information from a reliable source that contains the individual's name and address,
 - B. information from a reliable source that contains the individual's name and date of birth,
 - C. information that contains the individual's name and confirms that they have a deposit account, credit card or other loan amount with a financial institution.

2. If the client or third party is an organization such as a corporation or society that is created or registered pursuant to legislative authority, a written confirmation from a government registry as to the existence, name and address of the organization, which includes the names of the organization's directors, if applicable such as,

- i. a certificate of corporate status issued by a public body,
- ii. a copy obtained from a public body of a record that the organization is required to file annually under applicable legislation, or
- iii. a copy of a similar record obtained from a public body that confirms the organization's existence.

3. If the client or third party is an organization other than a corporation or society that is not registered in any government registry, such as a trust or partnership, a copy of the organization's constating documents, such as a trust or partnership agreement, articles of association or any other similar record that confirms its existence as an organization.

Requirements re documents, data and information used for verification

(8) For the purposes of subsection (4), documents and records used must be authentic, valid and current and other information used must be valid and current.

Client verification: individual younger than 12 years

(9) If a licensee is required to verify the identity of an individual who is under twelve years of age, the licensee shall verify the identity of a parent or guardian.

Client verification: individual 12 years or older but younger than 15 years

(10) If a licensee is required to verify the identity of an individual who is at least twelve years of age but not more than 15 years of age, the licensee may do so by obtaining information from a reliable source that contains the name and address of a parent or guardian and confirming that the address of the parent or guardian matches the individual's address.

Client verification: use of agent, etc.

(11) A licensee complies with the verification requirements set out in subsection (4) if,

(a) an employee of the licensee's firm or another licensee who practises law or provides legal services through the licensee's firm, acting on behalf of the licensee, complies with the requirements; or

(b) an individual who is not an individual mentioned in clause (a), acting on behalf of the licensee, complies with the requirements, provided that,

(i) the licensee and the individual, prior to the individual acting on behalf of the licensee, enter into a written agreement for this purpose, and

(ii) the licensee obtains from the individual the information obtained by them under the agreement, satisfies themselves that the information is valid and current and satisfies themselves that the individual complied with subsections (4) to (10).

Client verification: previous verification

(12) A licensee complies with the verification requirements set out in subsection (4),

(a) if the licensee has previously complied with the verification requirements set out in subsection (4) and has no reason to believe the information or the accuracy of the information has changed; or

(b) an individual acting on behalf of the licensee under subsection (11) previously complied with the verification requirements set out in subsection (4) either acting in their own capacity at the time, whether or not they were required to comply with the verification requirements set out in subsection (4), or acting on behalf of another licensee at the time pursuant to an agreement under subsection (11).

Recording information

(12.1) The licensee shall record all information obtained for the purposes of subsections (1) to (2.2) and the date on which it was obtained.



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TAB 10

17th Solo and Small Firm Conference: Secrets for Success

Growth Stories of Successful Law Firms

Jacqueline Swaisland
Landings LLP

Darlene Tonelli
Inter Alia Law

June 8, 2023



A Few Tips for Growing a Law Firm

Jacqueline Swaisland
Co-Founder, Landings LLP

Landings LLP is an immigration and refugee law firm which was named one of Canada's Best Law Firms by the Globe and Mail in 2023. Landings was founded in 2020 at the height of the pandemic. In its first three years, it has grown from 3 lawyers, a law student, and one legal assistant to 9 lawyers and 7 support staff.

Managing this kind of growth was tricky and involved a lot of growing pains. Here are a few tips that were learned along the way on how to grow your law firm.

1. Figure out why you want to grow.

Before you start to grow your law firm, it's important to think through in advance why you want to grow your law firm. Bigger isn't always better, so figure out what it is that you want to accomplish with growth. Is it to increase your bottom line? Diversify your practice? Make it easier to do the kind of work that you want to do? By figuring out the reason or reasons you want to grow, you will have a better idea of what kind of growth is likely to work best for your firm (Do you need more admin support? Additions to your legal team? A bit of both?). It will also assist you to put metrics in place so you can assess down the road if your firm's growth is actually helping you to accomplish what you wanted it to.

2. Try to be proactive with growth.

It often feels safer to take on a lot of new clients to support your firm's growth and then add on the staff you need. However, onboarding new people, whether they are lawyers or support staff, takes a lot of time and energy, especially from a small team. So, if you wait until you are overloaded with work, taking on new staff may be overwhelming, and you may have to cut corners when doing so. A better approach is to do the onboarding of new staff and then do a big push for additional clients once the new staff are onboard.

3. Try to think through any unintended consequences of your growth.

In a small practice adding just a few more people can significantly impact how things work. Try to think through how all aspects of your practice might be affected by the new growth and where it may create bottlenecks. For example, with additional lawyers on board you are likely to get more intake calls, require additional bookkeeping services, and potentially additional office space. It may also result in you having different technology needs. For example, you may need to increase your internet capacity, change the legal software you work with, or upgrade your online storage capacity. You may also need to formalize firm policies and practices to ensure consistency and fairness across employees, have different lines of communication available (team meetings anybody?) and develop reporting hierarchies. Thinking through and ideally proactively addressing these issues as you grow will make the growth easier to manage.

4. Try to standardize employee onboarding.

If you are hoping to add more than 1-2 people to your team (either now or in the future) a big timesaver can be standardizing your onboarding process. Put together a list of all the items that must happen when a new person joins the firm. What technology do they need to have? What programs do they need passwords/subscriptions for? What training do they need? Not only will this help to prevent you from

reinventing the wheel each time an employee gets hired, but an added benefit is that much of this list can easily be turned into an offboarding checklist you can use when employees leave.

5. Hiring is tough – you aren't always going to get the right one.

Hiring new staff, whether it's a new administrative support person, a bookkeeper, or a new lawyer, is tough. Some people interview very well but make terrible employees. Others tell you that their lifelong dream is to work at your firm only to leave a few months in for their actual dream job. Turnover is inevitable as you grow your firm. Do your best not to take it personally but do try to learn from the experience. For example, were there red flags that you saw that you should have paid more attention to? It can also be helpful to conduct exit interviews with your staff as they are leaving. What did they think about the job? The onboarding process? The firm environment? Is there anything they would recommend changing? Employees on their way out the door may feel less inhibited and provide helpful feedback that can help you to retain employees in the future or make other positive changes to your firm.

5. Check in and make sure your firm's growth is doing what you want it to.

After you have experienced growth, it's always helpful to look back on your initial goals and see if the growth got you where you wanted it to. Sometimes the growth will have helped you to accomplish everything you wanted to and more. But sometimes you may find that it hasn't had the consequences you wanted. For example, while you may have hoped that the growth would allow you to cut back on your workload, you may find that the additional management and client load has actually added to it. Or maybe the increase in income you were hoping for isn't where you wanted it to be. Or maybe you didn't add the right balance of people and an extra support person or lawyer will help to make things run more smoothly. Critically evaluating your growth will help you to assess if you are where you want/need to be and will also help you to figure out what your next steps are for the future of your firm.

Some Additional Reading:

Lawyer Monthly - 5 Tips to Help You Grow Your Small Law Firm:

<https://www.lawyer-monthly.com/2022/10/5-tips-to-help-you-grow-your-small-law-firm/>

Clio: The Complete Guide to Growing your Law Firm:

<https://www.clio.com/blog/growing-a-law-firm/>

California Business Journal – 4 Law Firm Tips That Help Grow Your Practice Even In Tough Times:

<https://calbizjournal.com/4-law-firm-tips-that-help-grow-your-practice-even-in-tough-times/>

Growth Stories of Successful Law Firms

Darlene Tonelli, Inter Alia Law

17th Solo and Small Firm Conference: Secrets for Success

Background on IAL:

Inter Alia Law was founded as a sole proprietorship in 2013. Since then it has steadily grown into a team of 10 lawyers who practice in association. IAL lawyers use their in-house experience and large firm training to help small companies with no legal department, as well as other in-house counsel in larger companies. to solve workload issues and workflow challenges. We focus on commercial contract drafting and negotiation in the technology and entertainment industries, and copyright licensing.

Growth for IAL has been fueled by:

- Creating a values-driven organization that attracts lawyers who share those values. By being clear on our values and speaking publicly about them, we've attracted a team that supports the goals of the organization, making it easy to grow with those goals in mind.
- Building the business model out steadily to ensure that it supports the concept of creating a great team and great work environment (awesome clients, respectful interactions, transparent revenue model). There are so many micro-levers that make this possible.
- Marketing using my own extra time in the early years, rather than spending marketing dollars. I did a lot of speaking all over the city, and invested energy in making my presentations reflect Inter Alia's personality and brand and did one of the first lawyer podcasts that focused on the practice of law rather than black letter law topics.
- Hiring a team of competent and capable helpers (assistant, bookkeeper, accountant, marketing/web person) as variable costs.
- Not compromising on talent for recruits, and making hiring decisions slowly and with an eye on the ecosystem of the association and what each new member will contribute.
- Flexibly responding to the needs of our clients when creating new products at the firm.
- Not getting caught up in growth for the sake of it, but growing to organically serve our clients as well as we can, and to enhance our team.



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17th Solo and Small Firm Conference: Secrets for Success

Clio Resources

Jack Newton, CEO & Founder
Clio

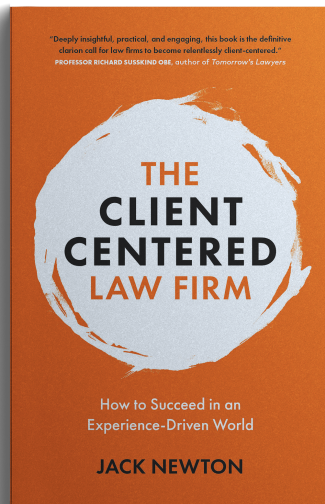
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