

PRESENTED BY CHAD BURTON

TECH SOLUTIONS FOR THE 2020 FAMILY LAWYER (AS THE WORLD BURNS)

DOES CHAD KNOW WHAT HE IS TALKING ABOUT?

- ▶ Created and operated one of the first virtual law firms
- ▶ Advises family law firms around the country on business and tech issues
- ▶ Probably knows more about law firm intake than you
- ▶ Has an [allegedly] unhealthy obsession with tech



**THANKS TO THE PANDEMIC, REMOTE
WORK AND USING TECHNOLOGY IS THE
'NEW NORMAL' FOR LAW FIRMS.**

Everyone, literally.



TWO THEMES FROM 2020

**FLEXIBILITY +
ACCESSIBILITY**

WHY DO LAWYERS NEED TO BE FLEXIBLE?

- ▶ We learned early in 2020 that our businesses can be upended with a few days notice.
- ▶ It is not so much 'if' but 'when' we will likely need to be remote again (if you are not still remote).
- ▶ Your team needs to know that they will be safe and can work in an environment that adapts to current health (and/or government required) needs.

WHY DOES LAW FIRM DATA NEED TO BE ACCESSIBLE?

- ▶ Before 2020, many in the legal profession felt that you weren't 'working' unless you were in the office. Not a hardcore criticism, just reality.
- ▶ Client and other firm information needs to be easily accessible from anywhere.
- ▶ Going to the cloud is no longer an option (and you are already there even if you don't realize it).
- ▶ Clients can't/won't/don't want to come to your office, so you need to make it easy for them to get info they need to participate effectively in their matter.

PEOPLE > TECH

- ▶ Be people, then tech focused
- ▶ One thing law firms have learned from the pandemic is that the attention to people is more important than ever. Your team needs attention, a lot.
- ▶ Tech can help enable such communication, but if you don't put the human care effort in, they will be lost.

NOW, LET'S TALK TECH

- ▶ Some tech is way better than no tech when it comes to modern, remote work.
- ▶ Avoid shiny object tendencies. Use what you have in place already to its fullest potential. For example, many firms have GSuite or Microsoft 365 already in place, but they are barely scratching the surface of its features and apps. Learn them and use them.
- ▶ Do you need to be a tech master? Nope, but you should surround yourself with those who can get the job done when it comes to making your firm tech centric. Plus, Ohio's ethics rules require you to be tech competent...

OHIO RULES OF PROFESSIONAL CONDUCT 1.1, COMMENT 8

Maintaining Competence

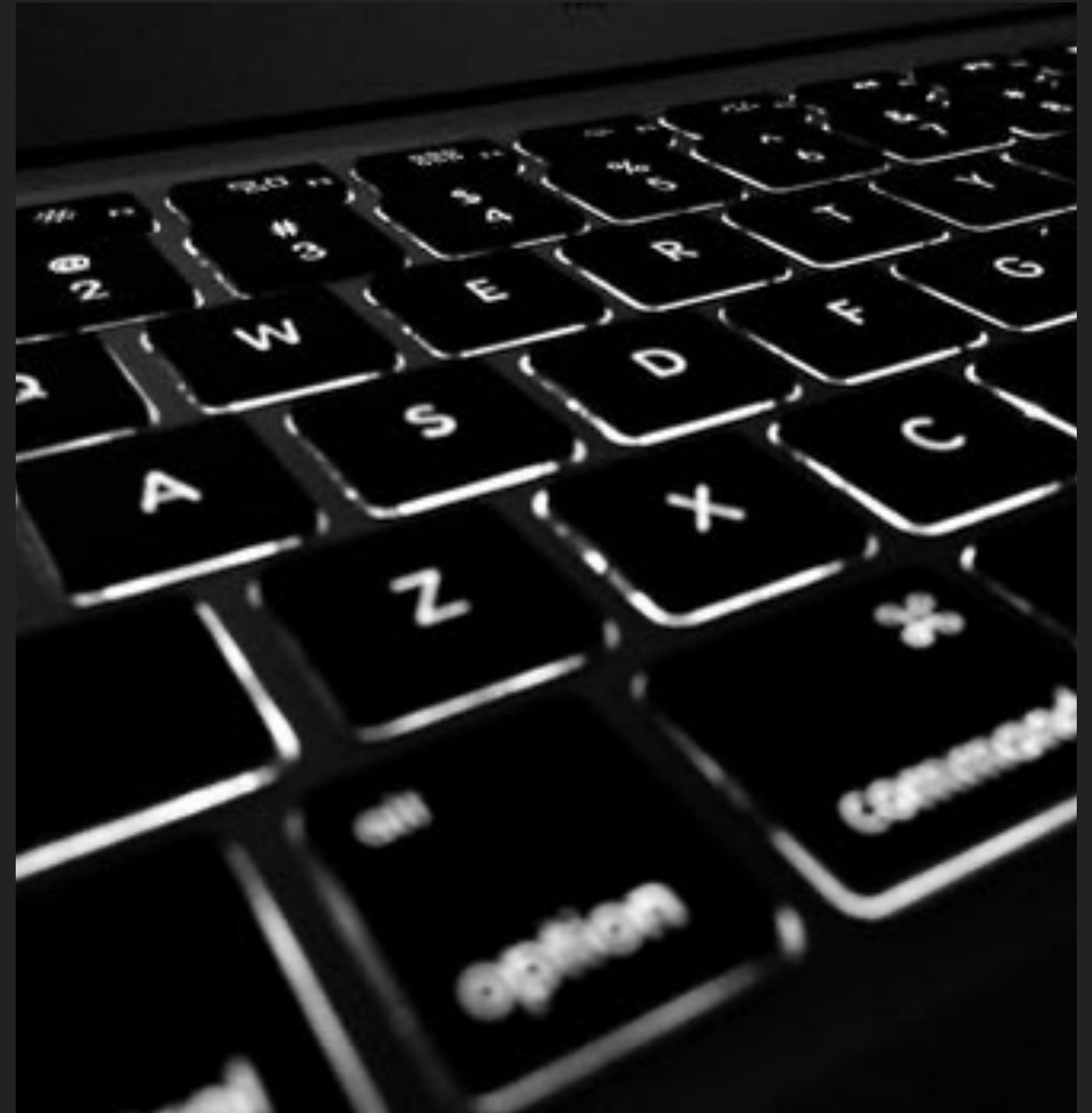
[8] To maintain the requisite knowledge and skill, a lawyer should keep abreast of changes in the law and its practice, including the benefits and risks associated with relevant technology, engage in continuing study and education and comply with all continuing legal education requirements to which the lawyer is subject.

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LET'S COVER 3 AREAS

- ▶ Tech is broad reaching, so let's focus on tech related to communication, collaboration and automation.
- ▶ Then, let's tie it all together by focusing on intake.



VIDEO CONFERENCING

- ▶ With pandemic life, being technically competent means you can efficiently conduct video conference meetings. Get to know all of the features, starting with how to mute and unmute your mic. 😊
- ▶ Video meetings are used for all aspects of law firm business: new client consultations, internal meetings, client meetings, mediation, trials, etc.
- ▶ Top solutions: Zoom, Google Meeting (included with GSuite), Microsoft Teams (included with 365), Skype (included with 365) and GoToMeeting

COLLABORATION

- ▶ Texting and email may be your default way to communicate with your team and clients.
- ▶ Law firms are widely adopting platforms including **Slack** and **Microsoft Teams**. These apps provide low cost options to consolidate chatter within your team. You can create channels by subject matter.
- ▶ Other options with chat: WhatsApp, RingCentral, Vonage

AUTOMATION

- ▶ Once you have your processes and procedures manually nailed down, automation will help your team be much more efficient.
- ▶ Most cloud-based applications have native integrations where they share information with other related/relevant apps. This allows you to reduce the number of times that data is entered (for example, you enter client info in case management software and it is sent to account software and other places it is needed).
- ▶ Popular automation tools: Zapier, IFTTT, iOS Shortcuts
- ▶ Zapier is a third-party tool that connects multiple cloud-based apps together.

BRINGING IT HOME WITH LAW FIRM INTAKE

- ▶ With exceptions, many firms have not paid enough attention to bringing new clients in the door. Yep, marketing is on most firm's radar, but the closing of sales is where things fall apart.
- ▶ Regardless of the size of your firm, you need a dedicated intake team, whether in-house or outsourced. Often, the 'intake' person also has 500 other tasks that they are dealing with at any given time. Leads don't get responded to or the person on the phone seeking to schedule a consultation isn't getting proper attention.
- ▶ Having the people, processes and tech in place will help ensure you get those clients in the door.

INTAKE TECHNOLOGY

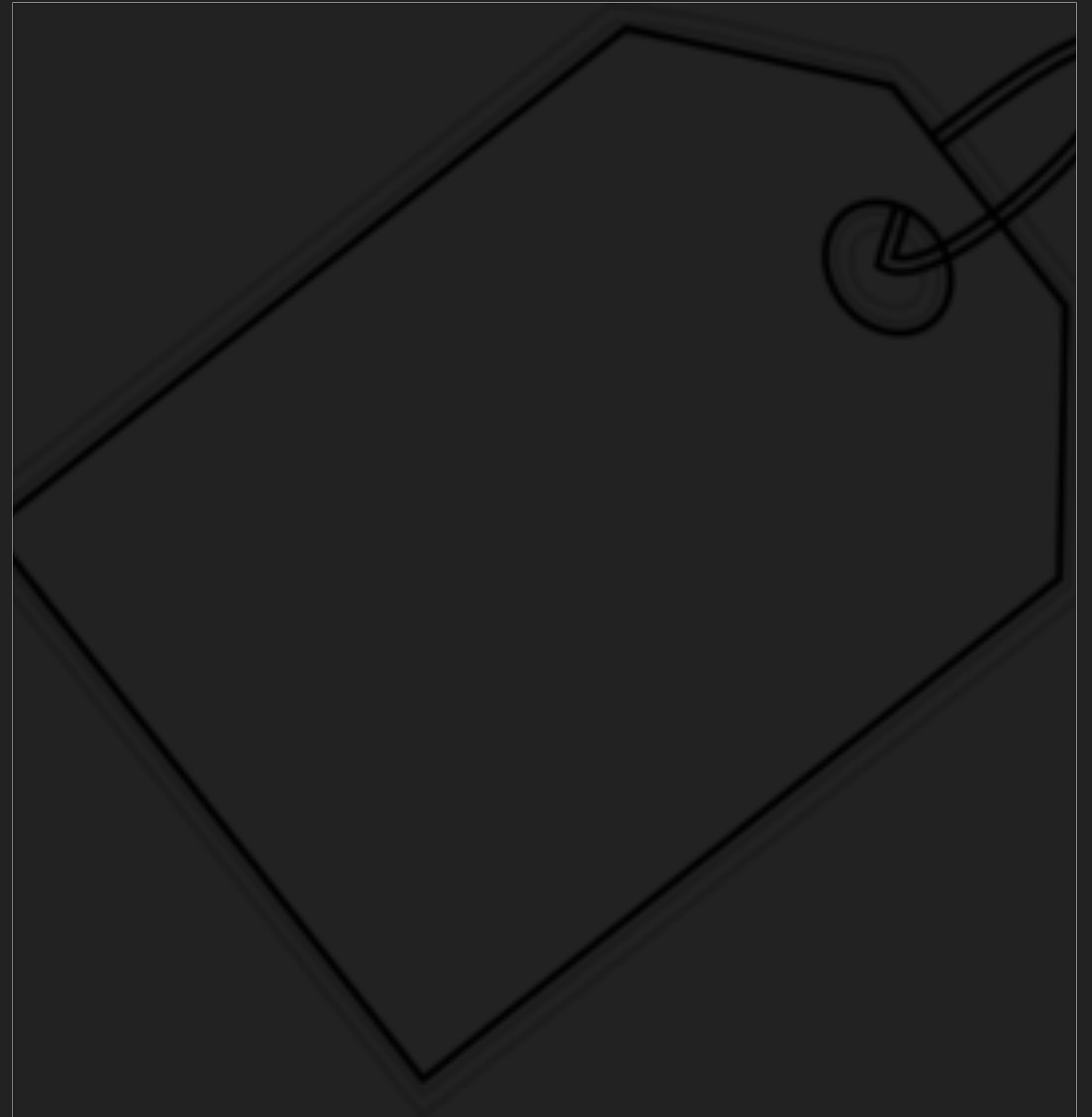
- ▶ So many options to track your leads...both legal market specific and non-industry specific.
- ▶ You can range from a hardcore CRM, like Salesforce, to simplicity with a spreadsheet (even though, in fairness, Excel is a feature-rich software tool).
- ▶ Legal case management software has CRM features, including MyCase, Rocket Matter and Clio Manage. There are also legal-specific CRMs, including Lawmatics and Clio Grow.

INTAKE TECHNOLOGY (DATA TRACKING)

- ▶ Regardless of the tech, you need something that you can extract data to properly report your intake numbers.
- ▶ Key Performance Indicators (KPIs) you need to track: leads (qualified and non-qualified), type of matter, referral sources, consultations (scheduled, attended and cancelled), conversions, etc.
- ▶ You cannot get accurate KPIs if you do not consistently input data. Track it all. You can have the newest, fanciest tech, but if it is not used, then why pay for it?

WRAPPING UP TECH

- ▶ Intake is a great topic to demonstrate how to effectively use tech in a remote law firm world. The tech allows you to process leads from anywhere.
- ▶ Leveraging tech will create data sets so you can measure the effectiveness of your system.
- ▶ New clients = more money, so why not focus on them?
- ▶ Make sure your team can access intake info from anywhere.
- ▶ Make sure you keep a flexible mind to try different options to tweak your system over and over.



REACH OUT TO CHAT MORE

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