

Strengthen Your Firm's Tech Skills

By Dodie Edelstein of Innovative Computing Systems, Inc. *

If your attorneys need to improve their use of technology, these incremental steps can show immediate results in efficiency and productivity.

Computer training is not typically at the top of an attorney's to-do list. But, with all the recent news about the unsatisfactory technical skills inside the walls of "Big Law", training is not something attorneys, or their firms, can afford to put on the backburner. Most firms encourage it, some firms demand it and other firms offer it but rarely get a good turnout. Your firm may be paying good money for a qualified instructor, but the attorneys are just not enthused about attending for reasons ranging from past training experiences to scheduling woes and client demands. Instead, they often look for the quickest way out. On the other side of the fence, an experienced software trainer tries hard to get attorneys to class because the knowledge offered will help create better lawyers. "If only they would embrace technology with open minds!" the trainer thinks.

There are many training options available to law firms that want to invest in improving the computer skills of their attorneys. If a classroom environment does not float your boat, find a resource available for one-on-one training. That way, attorneys get all their questions answered in the comfort and privacy of their own office -- and the trainer can focus on the topics most critical to them, instead of teaching a one-size-fits-all class.

For some firms, such suggestions will involve a great deal of change. So what can you do to improve efficiency in the meantime? Encourage attorneys to retrain bad habits into good ones by streamlining one task every week through learning how to make the tool on their desk work better for them. After all, that is what a computer is -- a tool to get the job done. Not knowing how to use that tool to its fullest potential brings frustration and inefficiency.

HERE ARE SOME THINGS FIRMS AND INDIVIDUAL ATTORNEYS CAN DO RIGHT AWAY:

1. Leverage automation. You have it, so take a few minutes and figure out how it could help. If you are doing something repetitive or cumbersome, rest assured, there is a better way. Ask someone you trust within your firm. If your firm is large enough, call the help desk. If not, consult your secretary. Do not keep clicking or pushing buttons -- it builds unnecessary stress.

2. Buy/use a macro package. Most firms have some sort of template or "macro" package that automates the everyday tasks involved in creating legal documents. A macro is simply a recorded series of steps that you can "run" to get a job done by clicking a single button. For instance, California courts require a very specific set of formatting rules that vary by county (and seem to get more complicated every year). Instead of having to know each court's rules, you can apply a macro package built to provide the correct formatting automatically. Many believe a macro package is too expensive. If a firm has upgraded to Microsoft Office, but expects to use Word right out of the box with no customization, this tends to lead down an exasperated path. Consider the cost of a pleading being rejected simply because a formatting rule was overlooked or misinterpreted, or because you missed a deadline due to the struggles of formatting that client document -- somehow the cost no longer seems so high. The time it saves attorneys will be well worth it.

3. Deal with emails. Having an overflowing Inbox is not a badge of honor. Excessive emails cost your firm money and time in saving, backing up and restoring everything when your mailbox becomes corrupt. Large mailboxes should be avoided at all costs. Would you keep a trash can full of old junk mail? There are lots of email management articles out there that can help you trim that Inbox. Basically, the rule of any paper or electronic communication is: touch it once and deal with it. File it in a client folder, in your document management system (DMS) or delete it. That is easier said than done, but it will truly change your life!

4. Search emails efficiently. Most law firms use Microsoft Outlook, and one would think that with such a ubiquitous product everyone would know the tricks of the trade. It pains those of us offering help to see attorneys scrolling through an endless list of messages, looking for that one from so-and-so with such-and-such document attached. To make sifting through emails more efficient (if you are using Outlook 2007 or 2010), look for the blank box above your emails that reads "Search Inbox" and start typing. This search function looks through everything -- from, subject, text and even attachments (if Windows is configured that way).

5. Do not reinvent the wheel. If you have a document management system, or if you store your documents in folders, learn to search for content. Your work product is already there; finding it is usually the issue. If you take the time to learn the secrets of searching, you can reference and leverage past work product rather than continually trying to cobble documents together or asking your colleagues if they have a decent stock option agreement with the specific provisions you need.

6. Name your documents methodically. To help in these searches, you will want to be able to recognize a document when you search by the filename. So, instead of calling something "Letter -- 3/3," try a more apt description to trigger your memory such as "Letter, John Doe, re: Settlement Agreement 03-03-13." The days of having to name a file with eight characters disappeared back when O. J. Simpson took off in that white Bronco.

7. Learn to cut, copy and paste. This is not a joke. It is amazing how many people do not know how to do this efficiently. One of the best, and easiest, ways to get the most from your software is learning to cut and paste properly. When pasting into any Microsoft product, you have options. You can choose to "merge formatting," which really means "bring the good formatting in -- leave the bad formatting out." In Word 2010, you can even set your default paste choice so that every paste is a good one, retaining all formatting automatically. In PowerPoint paste slides from another presentation and save the original formatting by selecting "keep source formatting"; you do not have to continue playing hopelessly with that slide master!

8. Hesitate before going rogue! Do not put all your trust in a software application that is not widely used. Law firms need stable, reliable products that are not too cutting edge. Innovation is great, but you do not want to be some software company's test case.

9. Trust in IT professionals. If you have an internal IT team, listen to them. If not, find a vendor or consultant you can trust with your systems. Do not simply go for the closest answer (such as using your partner's brother-in-law, because he knows computers)! Once you find a vendor or two, call your cohorts in the industry for an unbiased reference. After all, your documents are your work product, your intellectual property, your business. Make smart decisions about how you treat them.

10. Remember training does not cost -- it pays. The bottom line for law firms and their attorneys is that being savvy about technology is no longer optional. It is no longer something you can delegate to legal assistants, secretaries or your IT department. Every iota of knowledge you can add to your computing expertise makes you a better lawyer. There are small, incremental things you can do to improve the way you work and ultimately improve your firm's bottom line.

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