

BUILDING EFFICIENCY AND ETHICS INTO YOUR PRACTICE

CRISTAL ROBINSON



Cristal Robinson, JD & MBA

25 years of business, accounting, finance, and real estate

Over twelve years of experience as a litigation attorney in 42 courts with 46 different judges in over 900 cases representing people and businesses in federal and state courts

Licensed in Texas and North Carolina

State Bar of Texas: Law Practice Management Committee Member and Speaker

Objectives

There are several programs lawyers use to help their practices. This program will break down the different client management, law practice management, and content management software that will help you (and your firm):

- Prevent malpractice
- Manage your time
- Serve your clients efficiently
- Avoid bar complaint

Discover

Discover ways to reduce both drudgery and stress in your practice

Evaluate

Evaluate whether, when and how to get started with law practice management software

Clarify

Clarify issues important to you in choosing the right program for your practice

Recognize

Recognize mistakes to avoid in choosing and setting up your software



a lawyer should strive to become
and remain proficient and
competent in the practice of law



including the benefits and risks
associated with
relevant technology

Rule 1.01. Competent – Maintaining Competence

Opinion No. 648
Email

*Generally communicate
confidential information by
email,*

- Duty to advise of risks*
- Prudent to use encrypted
email or other form of
communication*

Opinion No. 665 Use of Metadata

- *Reasonable measures to avoid the transmission of confidential information*
 - *Embedded*
 - *In **electronic** communication*
- *Receives an **electronic** communication from another lawyer*
 - *Avoid misleading or fraudulent use of information the lawyer may obtain*
- ***Remove Metadata***

Opinion No. 680
Cloud-based
Software

- *May use a cloud-based electronic data storage or cloud-based software document preparation system to store client confidential information or prepare legal documents*
- *Must remain alert to the possibility of data breaches, unauthorized access, or disclosure of client confidential information and undertake reasonable precautions*

Client Management Software, ie Client Relationship Management (CRM)

PROS

- It puts everything you need into one place.
- CRM is a scalable solution.
- It allows for data mining.
- The data being collected can be accessed remotely.
- CRM can speed up the conversion process.
- It lowers an organization's overall daily costs.

CONS

- It eliminates the human element from the business equation.
- There can be security issues with CRM software.
- Employees must go through a learning curve with the new system.
- Technical support can be spotty
- Data can still get lost if the database isn't properly maintained.
- It can put sensitive data into the hands of a third party.

Questions to Ask yourself and staff before you look at software

1. Do you currently use or have you previously used practice management software?

Yes

No

2. If so, is it cloud-based or desktop/server based?

Cloud

Desktop/Server

3. How many lawyers in your firm will use the practice management software?

1 lawyer

2 lawyers

More than 2 lawyers

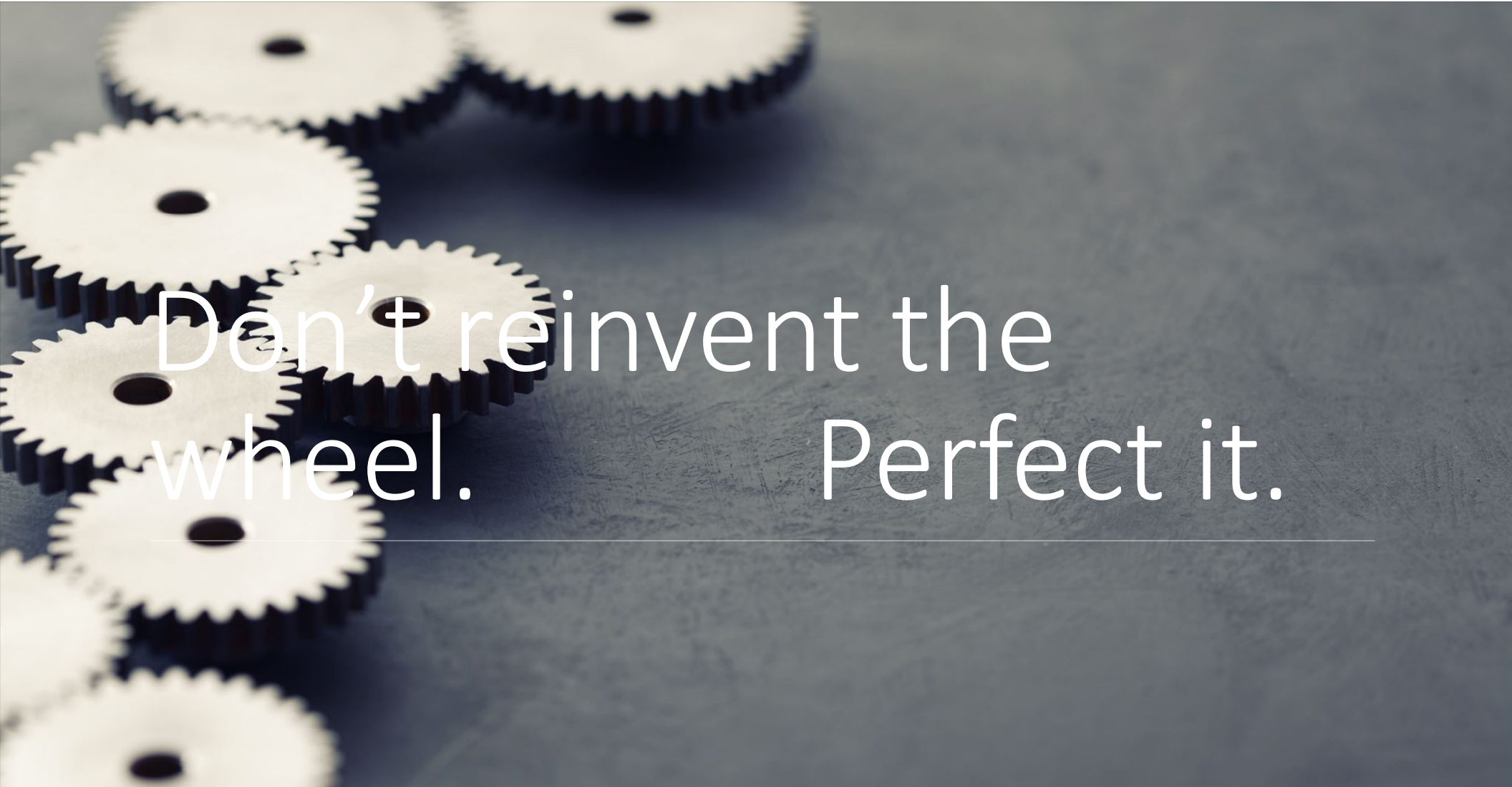
4. How many support professionals in your firm will use the practice management software?

0 support professionals

1 support professional

2 support professionals

More than 2 support professionals



Don't reinvent the
wheel. Perfect it.

What are you using now?

Email Program: Outlook Gmail

Calendar: Outlook Gmail

Self-Calendar: Acuity Other

Document Storage: Dropbox Box
OneDrive Google Drive

Receptionist Company: Lex Reception Smith A.I
Ruby Reception Other

Accounting: QuickBooks Other

Credit Card: LawPay Other _____

Automatic Mail: Mailchimp Other _____

Website: WordPress Other _____

How do you want to use it?

Receptionist Company Linked: Yes No

Opened Portal by Client: Yes No

Open Matter by Client: Yes No

Online Worksheets saves into CRM: Yes No

Workflows to streamline process: Yes No

Templates completed by data: Yes No

Billing Automatic in the Future: Yes No

Client informed about events: Yes No

Client informed to do things: Yes No

Client activities on CRM saved: Yes No

Client has access to file: Yes No

Automatic Email per Tag/Category: Yes No

Client Management Software is Law Practice Management

Feature	Clio	Rocket Matter	MyCase	Practice Panther
Founded	2008	2008	2010	2014
Company Name	Clio	Rocket Matter	AppFolio	Alpine Investors
Number of Employees	3500	30	1000	50
Security Audits	Regular 3 rd party	Unknown	Unknown	Unknown
HIPAA Compliant	Not directly	Not stated	Not stated	Yes
Linkable time entries	Yes	Yes	Yes	Yes
Document Storage	Yes	Yes	Yes	Yes, Higher Fee
Flat Fee Billing	Yes	Yes	Yes	Yes, Higher Fee
API Access	Yes	Yes	No	Yes, Higher Fee
UTMBS Code billing	Yes	Yes	No	Yes, Higher Fee
Data Migration	Yes	Yes	No	Yes
Third-Party Integrations	125+	Around 11	<10	<20
QuickBooks	Yes	Yes	Yes	Yes
Outlook	Yes	Yes	Yes	Yes
Gmail	Yes	No	No	Yes
Google Calendar	Yes	Unknown	Yes	Yes
Dropbox	Yes	Yes	Yes	Yes
Box	Yes	Yes	No	Yes
OneDrive	Yes	No	No	Yes
Google Drive	Yes	No	No	No
Zapier	Yes	Yes	No	Yes
LawPay	Yes, included	No (Lexcharge)	No, another	Yes, included
Ruby Receptionist	Yes	Yes	No	Unknown
Website	Third Party	Third Party	Yes, Fee	Third Party
Uptime	99.9% guarantee	Unknown	Unknown	Online 99.9%
Support	24 hours a day	Global 24 hours	11 Hours	10 Hours a day
Self-Serve Support	6500+ articles	Unknown	<300 articles	<500 articles
Bar Partners	66 Bars	Unknown	35 Bars	16 Bars
Classrooms	150+	Unknown	Unknown	<10
Staff App	Yes	Yes	Yes	Yes
Client Portal App	No	No	No	No
Price	\$39-99	\$55 per user	\$39	\$39, 59, 79*

Feature	Clio	Rocket Matter	MyCase	Practice Panther
Security Audits	Regular 3 rd party	Unknown	Unknown	Unknown
HIPAA Compliant	Not directly	Not stated	Not stated	Yes

How do you protect your client's information?

Feature	Clio	Rocket Matter	MyCase	Practice Panther
Data Migration	Yes	Yes	No	Yes
Uptime	99.9% guarantee	Unknown	Unknown	Online 99.9%
Support	24 hours a day	Global 24 hours	11 Hours	10 Hours a day

Will you need help with migration from an old system along with future support and training?

Feature	Clio	Rocket Matter	MyCase	Practice Panther
Self-Serve Support	6500+ articles	Unknown	<300 articles	<500 articles
Classrooms	150+	Unknown	Unknown	<10

Can you learn on your own?

How do you onboard your clients?

Feature	Clio	Rocket Matter	MyCase	Practice Panther
Embedded Intake Forms	Yes, 3 rd Party	Yes	No	Yes
Inside Intake Forms	No	No	Yes	No
E-Signature Agreement	Yes	No	Yes	No

What type of email do you use NOW?

Feature	Clio	Rocket Matter	MyCase	Practice Panther
Outlook	Yes	Yes	Yes	Yes
Gmail	Yes	No	No	Yes

Which calendar do you already use?

Feature	Clio	Rocket Matter	MyCase	Practice Panther
Google Calendar	Yes	Unknown	Yes	Yes
Microsoft Office	Yes	Yes	Yes	Yes

What is your current document storage?

Feature	Clio	Rocket Matter	MyCase	Practice Panther
Document Storage	Yes	Yes	Yes	Yes, Higher Fee
Dropbox	Yes	Yes	Yes	Yes
Box	Yes	Yes	No	Yes
OneDrive	Yes	No	No	Yes
Google Drive	Yes	No	No	No

Feature	Clio	Rocket Matter	MyCase	Practice Panther
Lex Reception	Yes	No	No	Yes
Smith.AI	Yes	Yes	Yes	Yes
Ruby Receptionist	Yes	Yes	No	Unknown

Which receptionist company do you use?

How do you send invoices and get paid?

Feature	Clio	Rocket Matter	MyCase	Practice Panther
Trust Accounting	Yes	Unknown	Yes	Yes
QuickBooks	Yes	Yes	Yes	Yes
LawPay	Yes, included	No, (Lexcharge)	No, another	Yes, included

How do you keep track of time?

Feature	Clio	Rocket Matter	MyCase	Practice Panther
Linkable time entries	Yes	Yes	Yes	Yes
Flat Fee Billing	Yes	Yes	Yes	Yes, Higher Fee
UTMBS Code billing	Yes	Yes	No	Yes, Higher Fee

Do you use other programs that will link to the CRM?

Feature	Clio	Rocket Matter	MyCase	Practice Panther
API Access	Yes	Yes	No	Yes, Higher Fee
3rd-Party Integrations	125+	Around 11	<10	<20
Zapier	Yes	Yes	No	Yes
MailChimp	Yes	No	No	Yes

Other CRM's not used to compare

LEGAL INDUSTRY

Smokeball

LawMatrix

Matter365

ANY INDUSTRY

Salesforce

HubSpot

Copper

Content Management Soft

A content management system is a software application that can be used to manage the creation and modification of digital content. CMSs are typically used for enterprise content management and web content management.

- Hubspot
- GoDaddy
- Salesforce CMS
- Wix



How I do a Mobile Office?



What I use?

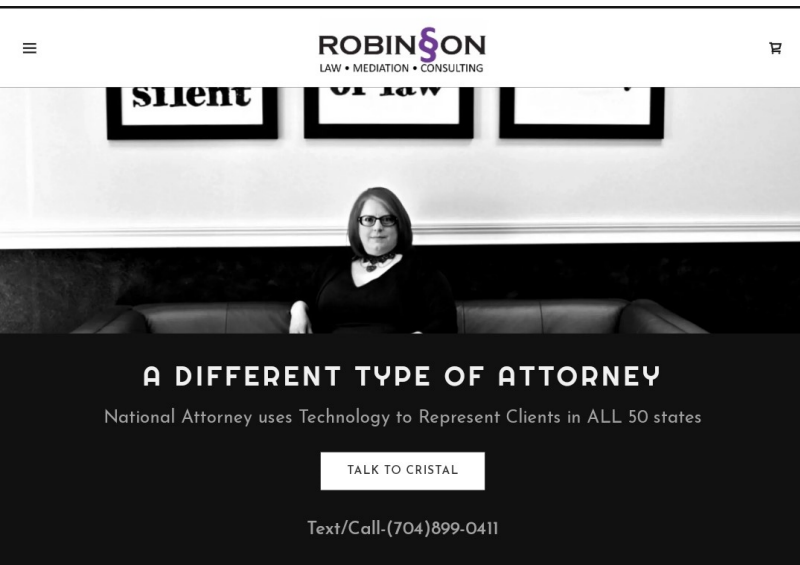
Email Program:	Outlook
Calendar:	Gmail
Self-Calendar:	GoDaddy
Document Storage:	Box
Receptionist Company:	Other – Self – Ruby Receptionist in past
Accounting:	TrustsBook QuickBooks
Credit Card:	LawPay and some PayPal or Stripe
Automatic Mail:	Mailchimp
Website:	GoDaddy – NOT WordPress
CRM:	Practice Panther

How I answer the questions:

- | | | |
|-----------------------------------|------------------------------|-----------------------------|
| Receptionist Company Linked: | <input type="checkbox"/> Yes | <input type="checkbox"/> No |
| Opened Portal by Client: | <input type="checkbox"/> Yes | <input type="checkbox"/> No |
| Open Matter by Client: | <input type="checkbox"/> Yes | <input type="checkbox"/> No |
| Online Worksheets saves into CRM: | <input type="checkbox"/> Yes | <input type="checkbox"/> No |
| Workflows to streamline process: | <input type="checkbox"/> Yes | <input type="checkbox"/> No |
| Templates completed by data: | <input type="checkbox"/> Yes | <input type="checkbox"/> No |
| Billing Automatic in the Future: | <input type="checkbox"/> Yes | <input type="checkbox"/> No |
| Client informed about events: | <input type="checkbox"/> Yes | <input type="checkbox"/> No |
| Client informed to do things: | <input type="checkbox"/> Yes | <input type="checkbox"/> No |
| Client activities on CRM saved: | <input type="checkbox"/> Yes | <input type="checkbox"/> No |
| Client has access to file: | <input type="checkbox"/> Yes | <input type="checkbox"/> No |
| Automatic Email per Tag/Category: | <input type="checkbox"/> Yes | <input type="checkbox"/> No |

MY steps from Prospective Client to Closed File

1. Website
2. Conflict Check Form on Website
3. Automatic Emails to Explain the Process
4. Manually Open Client Portal AFTER Conflict Check – COULD DO IT BY ZAPIER
5. Open Document Storage - Box.com account with client Email Address
6. Get Appointment
7. Send Matter Intake Form from Website or in the Client Portal
8. Send Legal Service Agreement for e-Signature through Adobe or Hire Me on Website
9. Send Verification of Client Handbook and Client Portal Tutorial
10. Manually Decide Appropriate Workflow – COULD DO IT BY ZAPIER
11. Manually Save Appropriate Folders to Box.com - COULD DO IT BY ZAPIER
12. Complete the Forms, Process, and Steps in Workflow that was designed by laws and rules including Billing.
13. WHEN completed, send a Closing Letter by Automatic Email with the Final Document as stated in the Legal Service Agreement.



I do BORING stuff for FUN businesses and people.

Robinson Law, a NATIONAL boutique law firm, helps businesses STAY OUT OF COURT by educating them on what to do right in the first place and by helping families and other individuals STAY OUT OF COURT through mediation and collaborative law.

I MAKE IT EASY FOR YOU.

1. Conflict Check

2. Consultation

3. Hire Me

GIVE ME INFORMATION

MEET ME

Website

1. CONFLICT CHECK

1: INTAKE - Start the Process: Initial Information Contact with Conflict Check

What can we help you with? *

Law: Employment Diversity & Inclusion

First Name *

Last Name *

Business Name (if applicable)

Email *

Cell Phone *

Conflict Check - Who else is on the other side of the dispute or transaction? Name of Opposing Party, Business Partner, or Spouse, ect (if none, state NONE)

Are you working with an attorney on this issue?

Yes

Tell us a little bit about what is going on.

DO NOT PROVIDE ANY CONFIDENTIAL INFORMATION ABOUT YOUR CASE UNTIL AFTER THE CONFLICT CHECK.

I'm not a robot



Submit

Cancel

2. GET APPOINTMENT

Conflict Check Form on Website



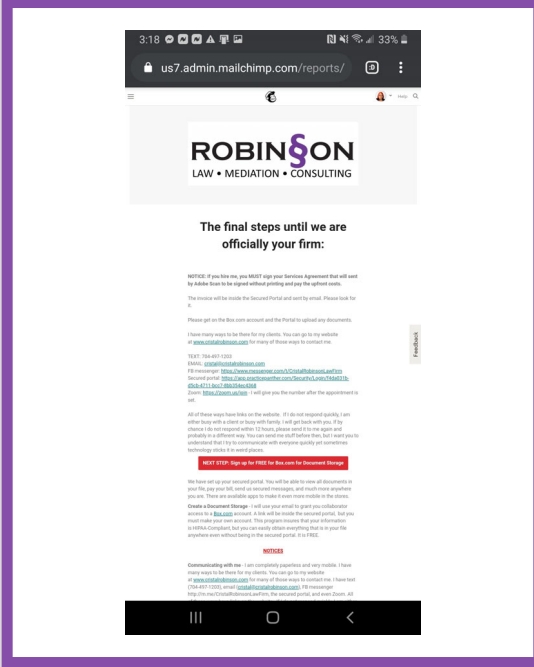
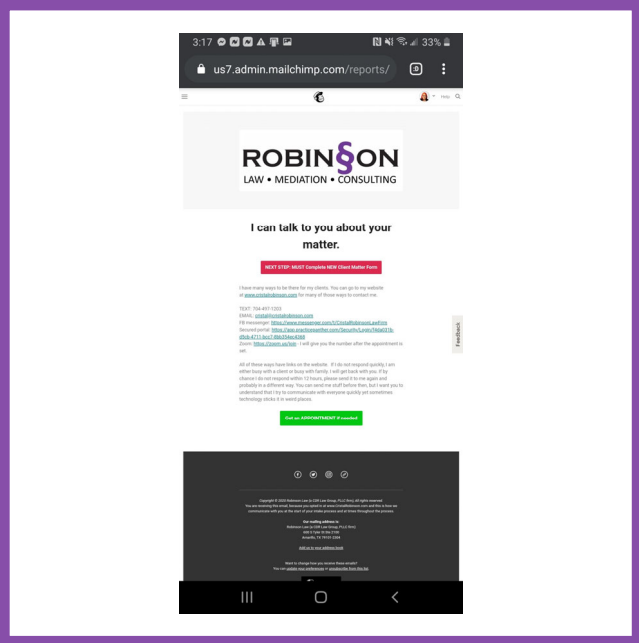
1. CONFLICT CHECK

Thank You

Your form has been submitted successfully

Confirmation of Website

Automatic Emails to Explain the Process



app.practicepanther.com/Account/1

☰ + ⌚ Start Timer 📧 🌐 👤

FIRST NAME

Test M

LAST NAME

Test Last

HOME

Add home number...

MOBILE

111222333

OFFICE

Add office number...

FAX

Add fax number...

EMAIL

cristalesq@gmail.com

CLIENT PORTAL

Yes

Manually Open Client Portal AFTER Conflict Check –
COULD DO IT BY ZAPIER

Invite People

place email here|

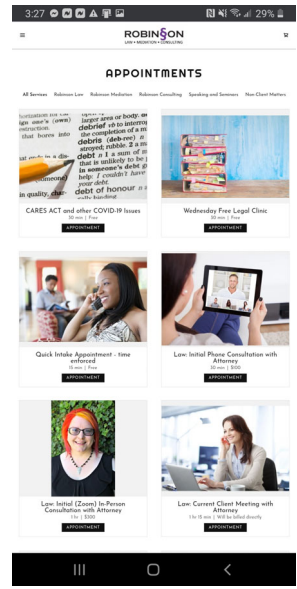
Viewer Uploader

Change Access

Upload, download, preview and share files.

Open Document
Storage - Box.com
account with
client Email
Address

Get Appointment on Website



crystalrobinson.com/matter-informa

24/7/365 Access to YOUR file • Cellphone Accessible • Secured Client Portal

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LAW • MEDIATION • CONSULTING

2: Intake: Matter Information

Robinson Law - Mediation - Consulting will use this information to complete the Service Agreement and other forms with your vital information. If you do not know of the Opposing Party, Business Partner, or Spouse, ect's information please write NONE or N/A.

What is your need? *

Mediation: Relationship Dissolution (Divorce) ▾

First Name *

Middle Name

Last Name *

Address *

City *

State *

Zip

Mailing Address (if different from above)

Client's Date of Birth *

Client's Place of Birth *

3: INTAKE - Client Handbook and Client Portal Tutorial

The legal process can be very scary. Robinson Law wants to make it as easy as possible. We have many handbooks and tutorials to learn the various areas of the law and steps along the way. First we have a handbook and a tutorial for the client portal.

CLIENT HANDBOOK

<https://img1.wsimg.com/blobby/go/24abe46b-50c2-4426-807e-9de6200a6bfb/downloads/Client%20Handbook.pdf?ver=1556717145920>

I read the Client Handbook *

By entering my full name, I am stating that I read the Client Handbook. *

Send Matter Intake Form from Website or in the Client Portal

Acknowledgment and Signature of Client

Client Review of this Agreement: You have the right to review this engagement agreement outside the presence of this law firm and away from the law firm's office prior to signing it and you have a right to have this engagement agreement reviewed by another law firm prior to signing it. Likewise, you understand that this law firm is not retained until the signed original engagement agreement is returned to the law firm, including any corresponding deposit or retainer in good funds.

If you have any questions or concerns about the terms of this engagement agreement, please contact us immediately. On behalf of the law firm, we appreciate the opportunity to represent you in this matter.


By signing this agreement, I confirm that I have read this engagement agreement, understand its provisions, and agree to abide by it.

CLIENT ACKNOWLEDGED AND AGREED TO:

Contact Information

North Carolina Principal office of Robinson Law is located at 3540 Toringdon Way, Suite 239 Charlotte, NC 28277. Office phone is 704-497-1203. Email is Cristal@crystalrobinson.com.

Texas Principal office of Robinson Law is located at 600 S. Tyler, Suite 2100 Amarillo, TX 79101. Office phone is 806-350-5800. Email is Cristal@crystalrobinson.com.

Signature:  Sign here

Email: cdrlawgroup@gmail.com

Send Legal Service Agreement for e-Signature through Adobe

Hire Me Online for Limited Representation on Website

3:48 100% Signal 24%

147706 Access to YOUR Site • California Assembly • Second Client Portal

ROBINSON LAW • LIMITED REPRESENTATION

All Products

FEDERAL 501(C)(3) APPLICATION

\$495.00

FILE

File Name	Type	Size
501(c)(3) Application	PDF	801 KB

QUANTITY: 1

BUY TO CART

OVERSIGHT INCLUDES STATE FILING FEES

You will receive a checklist to complete along with 501(c)(3) forms or other. The first one will come via email on the website. The second meeting will cover the final documents and the process to complete the documents.

INCLUDES:

- WE 501(C)3

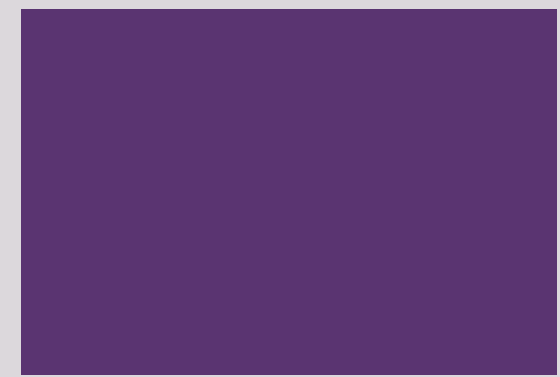
This is used to file for organizations that want to be a 501(c)(3) with the IRS. These are often provided for other types of businesses. Your fees are around \$25000 with convenience fee.

Read the Representation Agreement by clicking and making payment on page to the agreement. You will be required to sign the same agreement.

LIMITED SCOPE REPRESENTATION (LRR)

Agreement: This is a legal contract between the Client and the law firm of Robinson Law (RL). The law firm cannot take any representation or execute this contract.

Scope: This is a limited scope representation agreement between Robinson Law (RL) and the Client (C). The Client (C) is responsible for the preparation of the documents after consultation and execution of the agreement. The scope of representation provided by RL may be limited by agreement with the client or by the state statute which the lawyer's jurisdiction is applicable to this state. The lawyer or attorney may be held specifically liable through a legal malpractice claim. Although a legal malpractice claim may be subject to litigation in the state of Texas, the attorney handles liability, when a lawyer has been retained by an attorney to represent or counsel.



4:12 100% Signal 19%

cristalrobinson.com/hire-me?olsPaq

147706 Access to YOUR Site • California Assembly • Second Client Portal

ROBINSON LAW • LIMITED REPRESENTATION

HIRE ME FOR LIMITED REPRESENTATION

Categories

All Products

- Robinson Law - Business Law
- Robinson Law - Immigration Law
- Robinson Law - Intellectual Property Law
- Robinson Law - Texas Business Agreement
- Robinson Law - Real Estate Attorney
- Robinson Law - Family Law & Estate Planning
- Robinson Law - Law For Subcontractors
- Robinson Mediation - Family Mediation
- Robinson Mediation - Business
- Robinson Mediation - Other
- Robinson Consulting - Business Consulting
- Robinson Consulting - Business Consulting
- Robinson Consulting - Business Consultant and Management
- Robinson Consulting - Monthly Program

Grid of products:

- TEXAS WIDE OPEN BUSINESS: \$150.00
- Texas Estate Planning Single: \$1000.00
- Texas Business with No Asset or Job: \$3000.00
- Robinson Law - Family Law & Estate Planning: \$150.00
- Robinson Law - Law For Subcontractors: \$150.00
- Robinson Mediation - Family Mediation: \$150.00
- Robinson Mediation - Business: \$150.00
- Robinson Mediation - Other: \$150.00
- Texas Business with assets of home and cars but no job: \$150.00
- Texas Estate Planning Single: \$600.00
- Robinson Consulting - Law Firm Software Set: \$1499.99
- ROBINSON LAW - LIMITED REPRESENTATION: \$150.00
- Robinson Consulting - Monthly Program: \$99.99
- Texas Estate Planning Single: \$600.00
- Texas Business Realization - Mortgage: \$495.00
- 501(C)(3): \$495.00
- Robinson Consulting - Business Consultant and Management: \$150.00





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3: INTAKE - Client Handbook and Client Portal Tutorial

The legal process can be very scary. Robinson Law wants to make it as easy as possible. We have many handbooks and tutorials to learn the various areas of the law and steps along the way. First we have a handbook and a tutorial for the client portal.

CLIENT HANDBOOK

<https://img1.wsimg.com/blobby/go/24abe46b-50c2-4426-807e-9de6200a6bfb/downloads/Client%20Handbook.pdf?ver=1556717145920>

I read the Client Handbook *

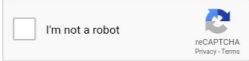
By entering my full name, I am stating that I read the Client Handbook. *

CLIENT PORTAL TUTORIAL

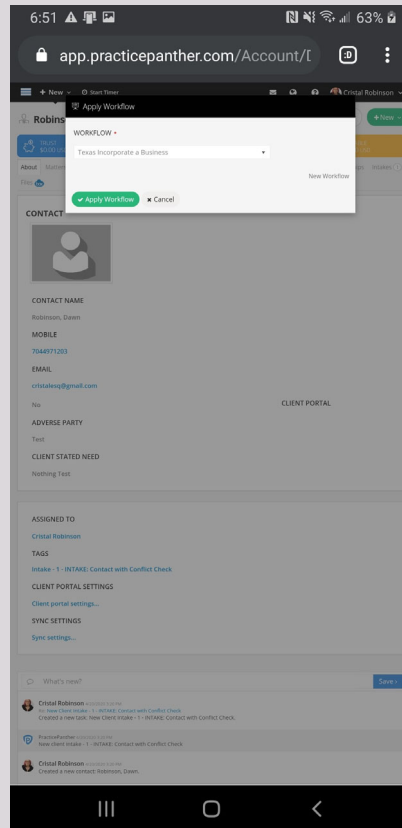
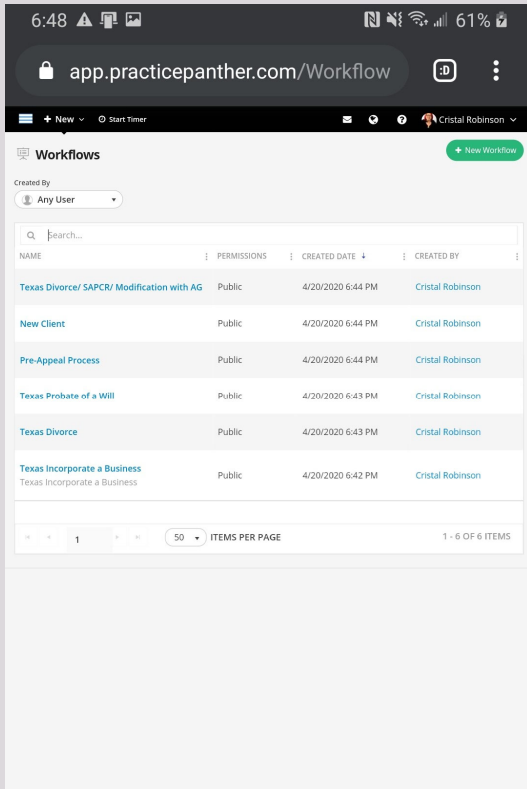
I read the Client Portal Tutorial. *

<https://support.practicepanther.com/client-portal/client-portal-for-clients/how-do-i-use-the-client-portal-to-communicate-with-my-attorney>

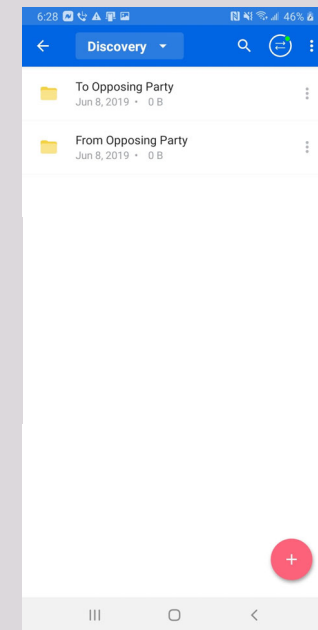
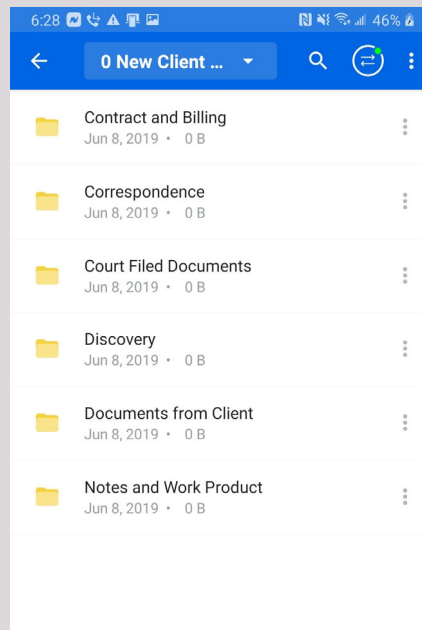
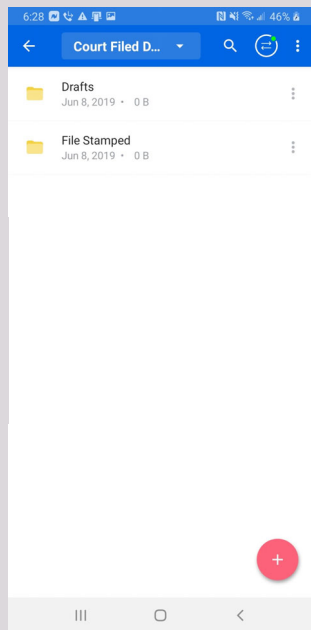
By entering my full name, I am stating that I read the Client Portal Tutorial. *



Send Verification of Client Handbook and Client Portal Tutorial




Manually Decide
Appropriate
Workflow –
COULD DO IT BY
ZAPIER



Manually Save Appropriate Folders to Box.com - COULD DO IT BY ZAPIER

Document Templates

Created By

 Any User ▼

 Search...

NAME	SHARING
Fee Agreement	Public
Estate Planning - Will Her Estate Planning - Will Her	Public
Texas Divorce: Prove up with no kids Texas Divorce: Prove up with no kids	Private
Texas Divorce: Request for Issuance of Service Texas Divorce: Request for Issuance of Service	Private
Texas Divorce: Original Petition for Divorce - NO KIDS Texas Divorce: Original Petition for Divorce - NO KIDS	Private

Complete the Forms, Process, and Steps in Workflow that was designed by laws and rules including Billing.

Time Entry & Billing

6:53 app.practicepanther.com/TimeEntry

Multiple Time Entries

CONTACT*	MATTER*	DATE*	BILLABLE*	BILLED BY*	HOURS*	RATE*	DESCRIPTION*
Select Contact...	Select Matter...	<input type="checkbox"/>	Cristal Robinson				Select It
Select Contact...	Select Matter...	<input type="checkbox"/>	Cristal Robinson				Select It
Select Contact...	Select Matter...	<input type="checkbox"/>	Cristal Robinson				Select It
Select Contact...	Select Matter...	<input type="checkbox"/>	Cristal Robinson				Select It
Select Contact...	Select Matter...	<input type="checkbox"/>	Cristal Robinson				Select It
Select Contact...	Select Matter...	<input type="checkbox"/>	Cristal Robinson				Select It

[New Time Entry](#) [Set Defaults](#)

Save Save & Add More Cancel

6:53 app.practicepanther.com/Invoice/Cr

New Invoice

LINKED TO CONTACT *

MATTER *

TEMPLATE *

START THIS INVOICE FOR APPROVAL?

INVOICE NUMBER *

DATE *

DUPLICATE *

DISCOUNT % *

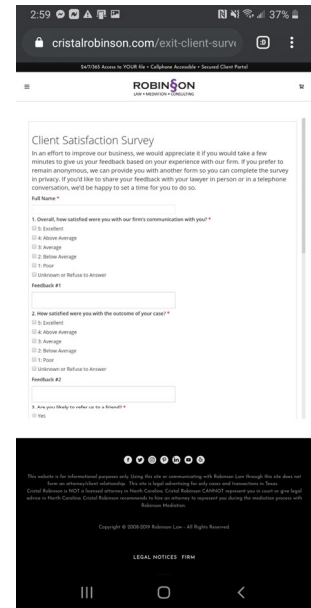
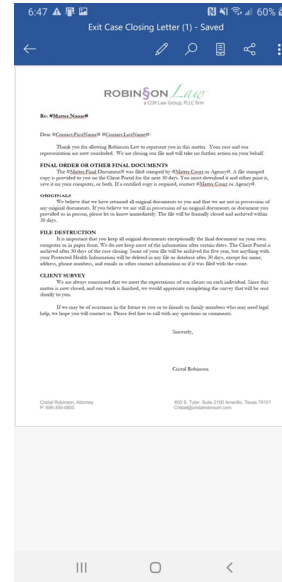
TIME ENTRIES	TIME ENTRY	DESCRIPTION	DATE	BILLED BY	HOURS	RATE	SUB
<input type="checkbox"/>					0.00	0.00	0.00
<input type="checkbox"/>					0.00	0.00	0.00
<input type="checkbox"/>					0.00	0.00	0.00
<input type="checkbox"/>					0.00	0.00	0.00
<input type="checkbox"/>					0.00	0.00	0.00

EXPENSES	SERVICE	DESCRIPTION	DATE	BILLED BY	QTY	PRICE	SUB
<input type="checkbox"/>					0.00	0.00	0.00
<input type="checkbox"/>					0.00	0.00	0.00
<input type="checkbox"/>					0.00	0.00	0.00
<input type="checkbox"/>					0.00	0.00	0.00

FLAT FEES	FLAT FEE	DESCRIPTION	DATE	BILLED BY	QTY	PRICE	SUB
<input type="checkbox"/>					0.00	0.00	0.00
<input type="checkbox"/>					0.00	0.00	0.00
<input type="checkbox"/>					0.00	0.00	0.00

Flat Fees...

WHEN completed, send a Closing Letter by Automatic Email with the Final Document as stated in the Legal Service Agreement.



Recap

By making your clients complete most of the intake on their case allows you to focus on the law and find mistakes with the case and documents.

By having steps in place for all areas of law, you hopefully prevent malpractice.

By having a program document your time throughout the process, you manage your time.

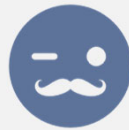
By having templates and workflows, you serve your clients efficiently.

By documenting your actions on a matter with 3rd party Software, you avoid bar complaints or at least have it ready to show your action.

Cristal
Robinson,
JD & MBA



Website & Blog:
www.CristalRobinson.com



@CristalRobinsonLaw

LinkedIn
Facebook
Instagram
YouTube
Pinterest
TikTok



Twitter: @CristalRobinson