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 keep abreast of changes in the law and its practice

including the benefits and risks associated with the technology relevant to the lawyer's practice

Rule 1.1. Competence – Maintaining Competence

RPC 215: Modern Communication Technology and the Duty of Confidentiality

Unsecure method of communication,

- *Take steps*
  - *To minimize the risk*
    - *that confidential information may be disclosed*

RPC 234: Electronic Storage of Client's File

- *An inactive client file*
  - *may be stored in an electronic format*
- *Preserve original documents with legal significance*
  - *Reproduce Electronic Documents on paper*

2008 FEO 5 - Web-Based Management of Client Records

- *Client files may be stored on a website accessible by clients via the internet*
- *Provided the confidentiality of all client information on the website is protected*

2009 FEO 1 – Review and Use of Metadata

- *Reasonable care to prevent the disclosure of confidential client information*
  - *Hidden in metadata*
  - *In **electronic** communication*
- *Receives an **electronic** communication from another party or another party's lawyer*
  - *Do NOT search for use confidential information in the metadata*
- ***Remove Metadata***

2011 FEO 6 – Subscribing To Software As A Service While Fulfilling The Duties Of Confidentiality And Preservation Of Client Property

- *May contract with a vendor of software*
- *Reasonable care to safeguard confidential client information*

Client Management Software, ie Client Relationship Management (CRM)

PROS	CONS
- 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.	- 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.

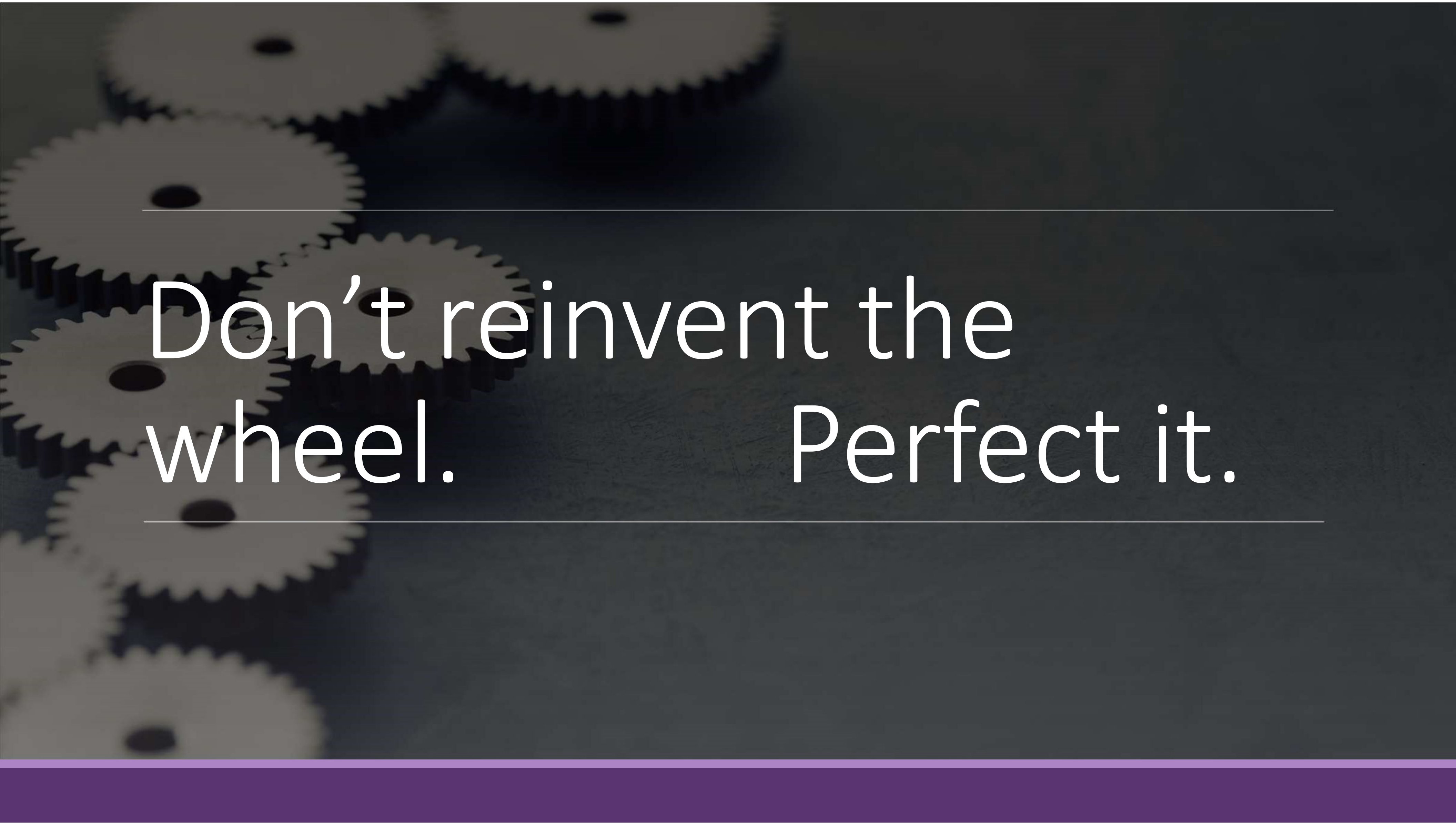
Questions to Ask yourself and staff before you look at software

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 ☐OneDrive	☐Box ☐Google Drive
Receptionist Company:	☐Lex Reception ☐Ruby Reception	☐Smith A.I ☐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 3rd 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 3rd 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, 3rd 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	ANY INDUSTRY
Smokeball	Salesforce
LawMatrix	HubSpot
Matter365	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:	☐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
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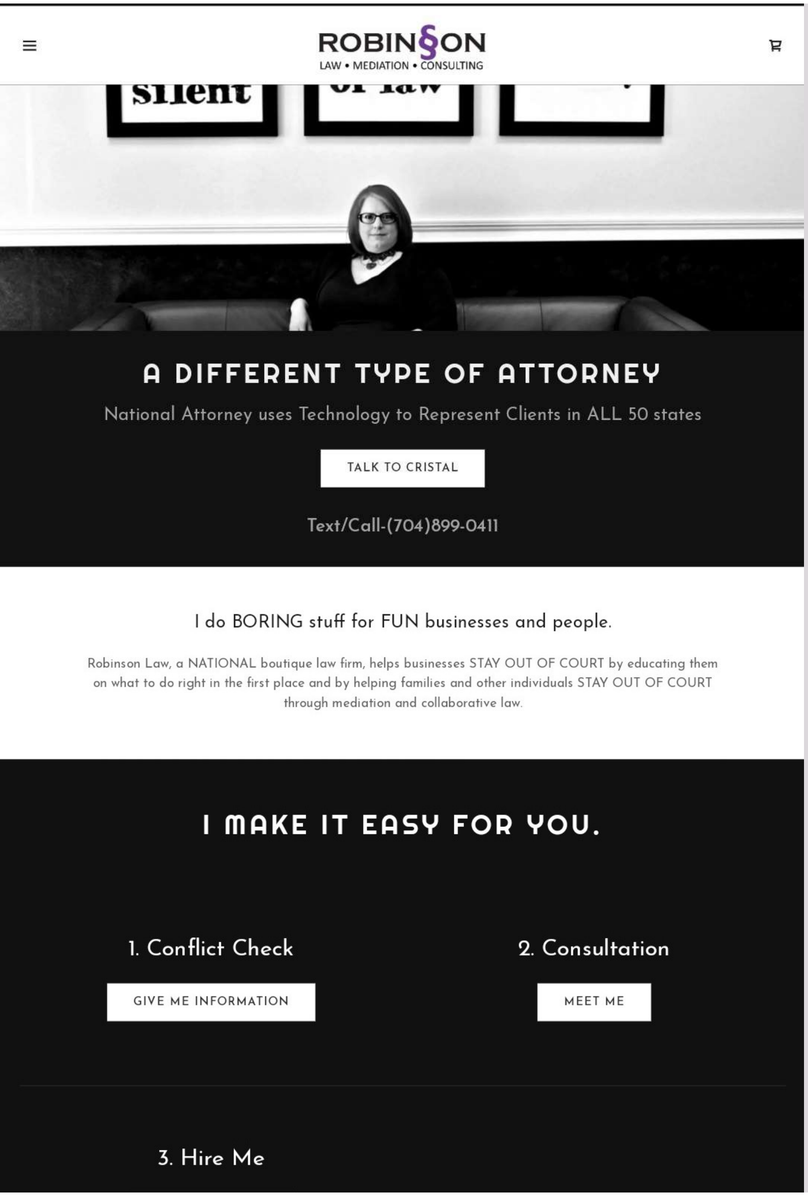
Client has access to file:	☐Yes	☐No
Automatic Email per Tag/Category:	☐Yes	☐No

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.

Website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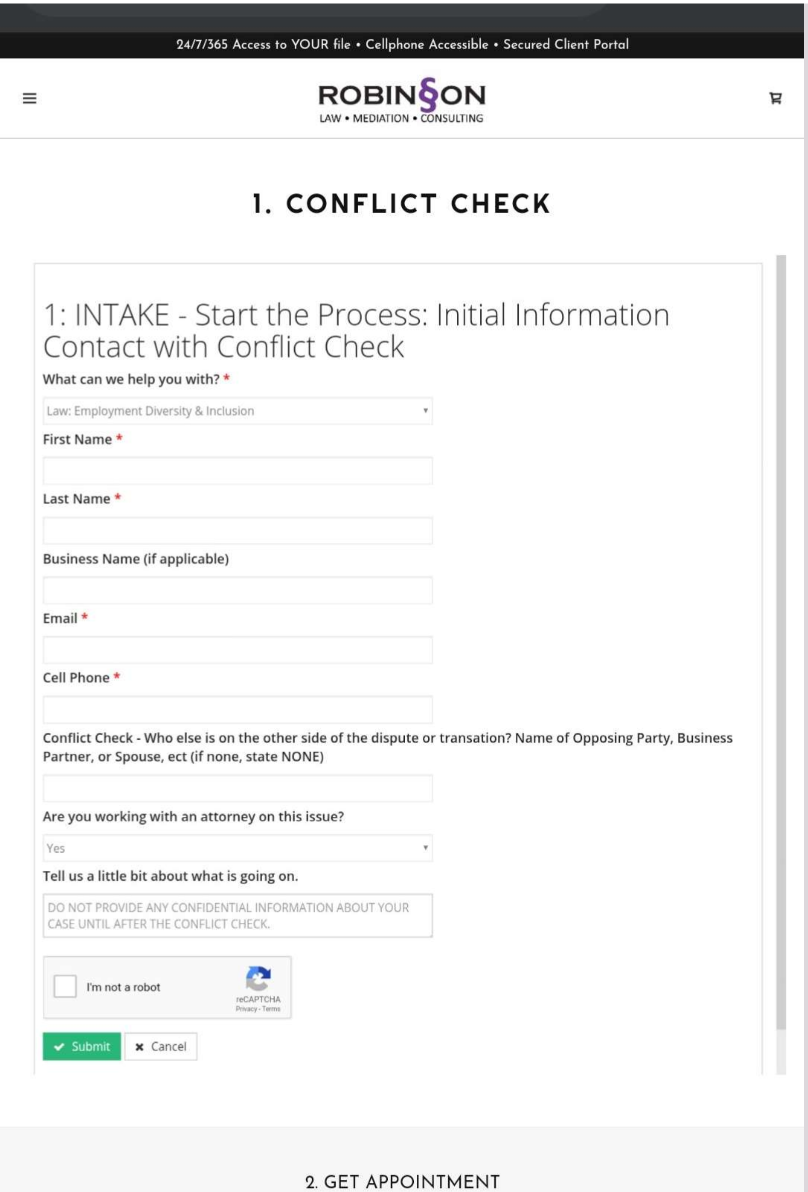
LAW • MEDIATION • CONSULTING
A DIFFERENT TYPE OF ATTORNEY
National Attorney uses Technology to Represent Clients in ALL 50 states
TALK TO CRISTAL
Text/Call-(704)899-0411
I do BORING stuff for FUN businesses and people.
Robinson Law, a NATIONAL boutique law firm, helps businesses STAY OUT OF COURT by 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
GIVE ME INFORMATION
2. Consultation
MEET ME
3. Hire Me



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

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LAW • MEDIATION • CONSULTING

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 transation? 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

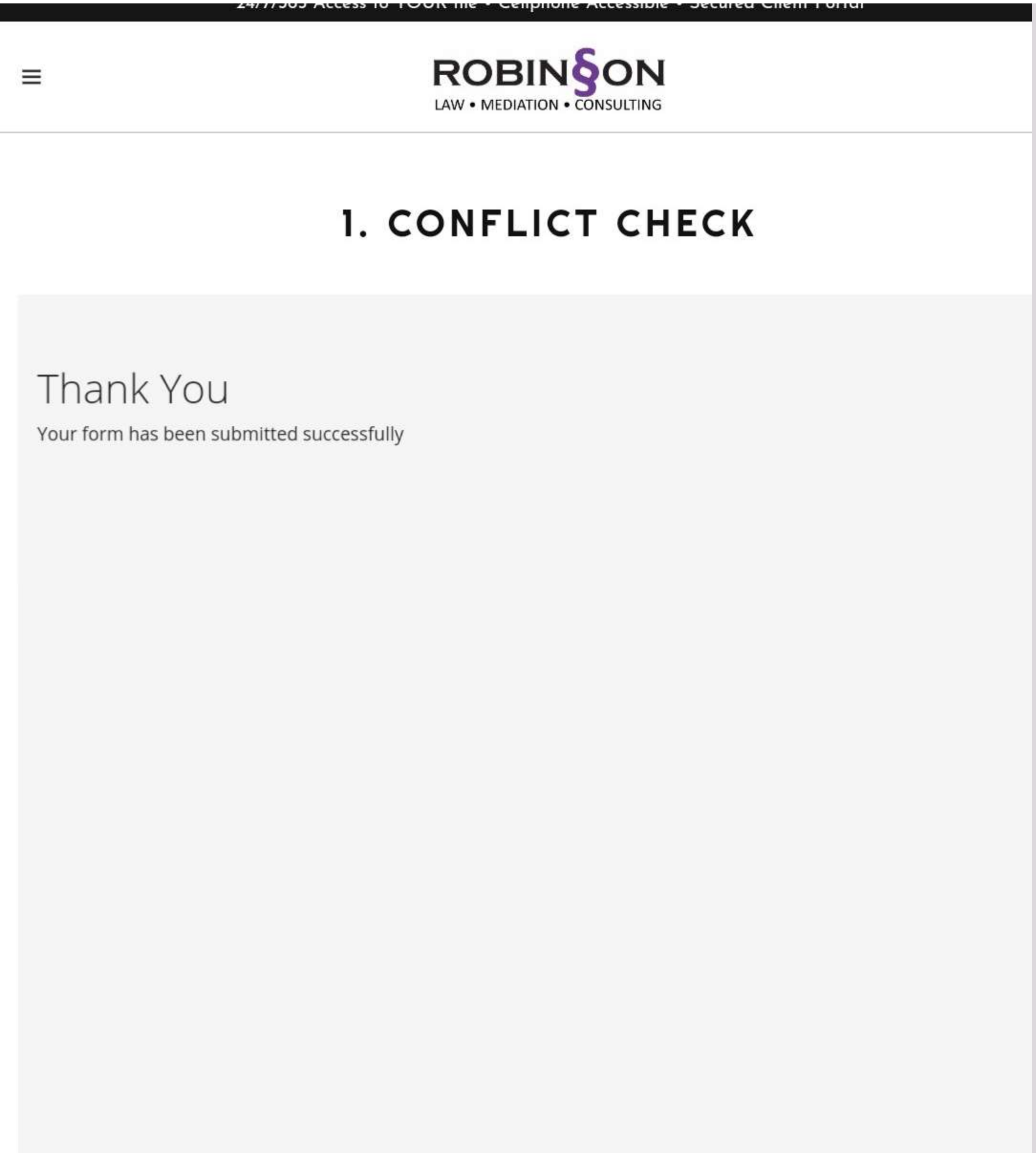
reCAPTCHA
Privacy - Terms

Submit

Cancel

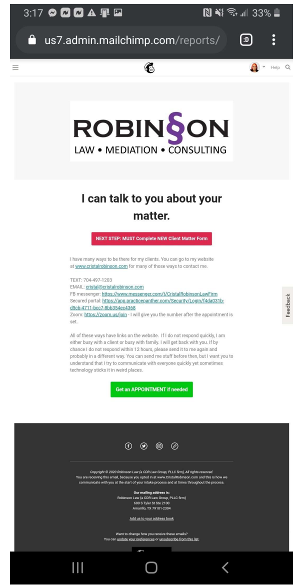
2. GET APPOINTMENT

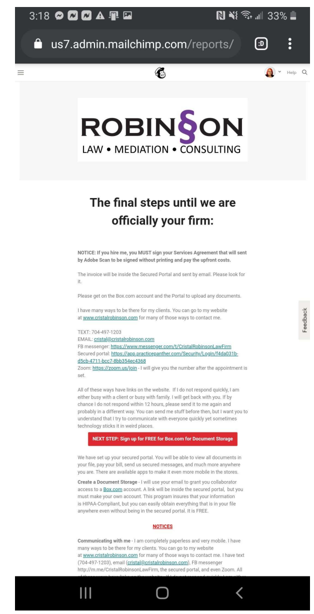
Conflict Check Form on Website

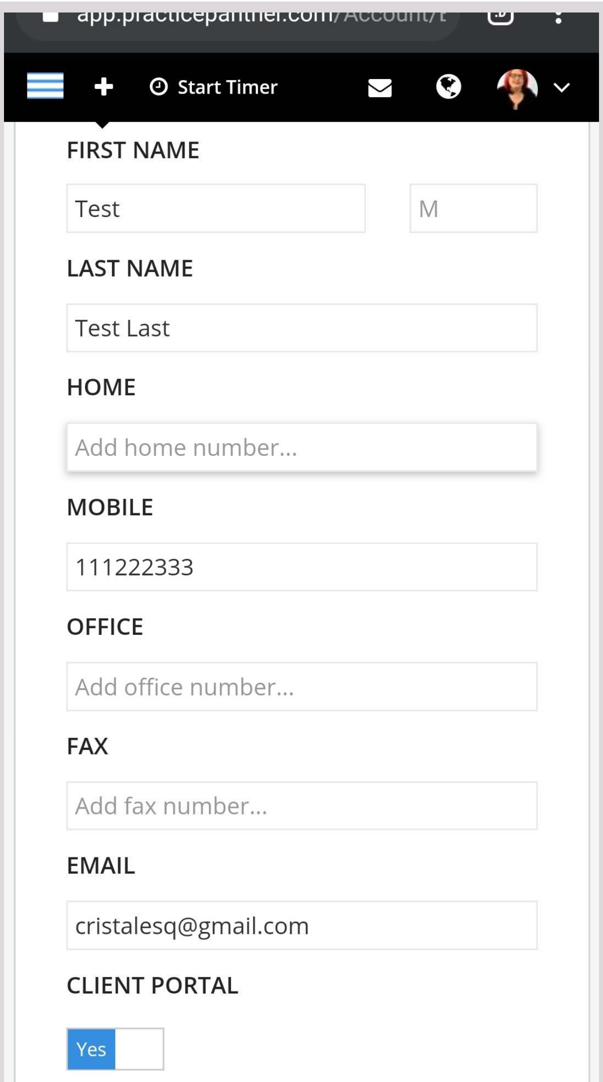


Confirmation of Website

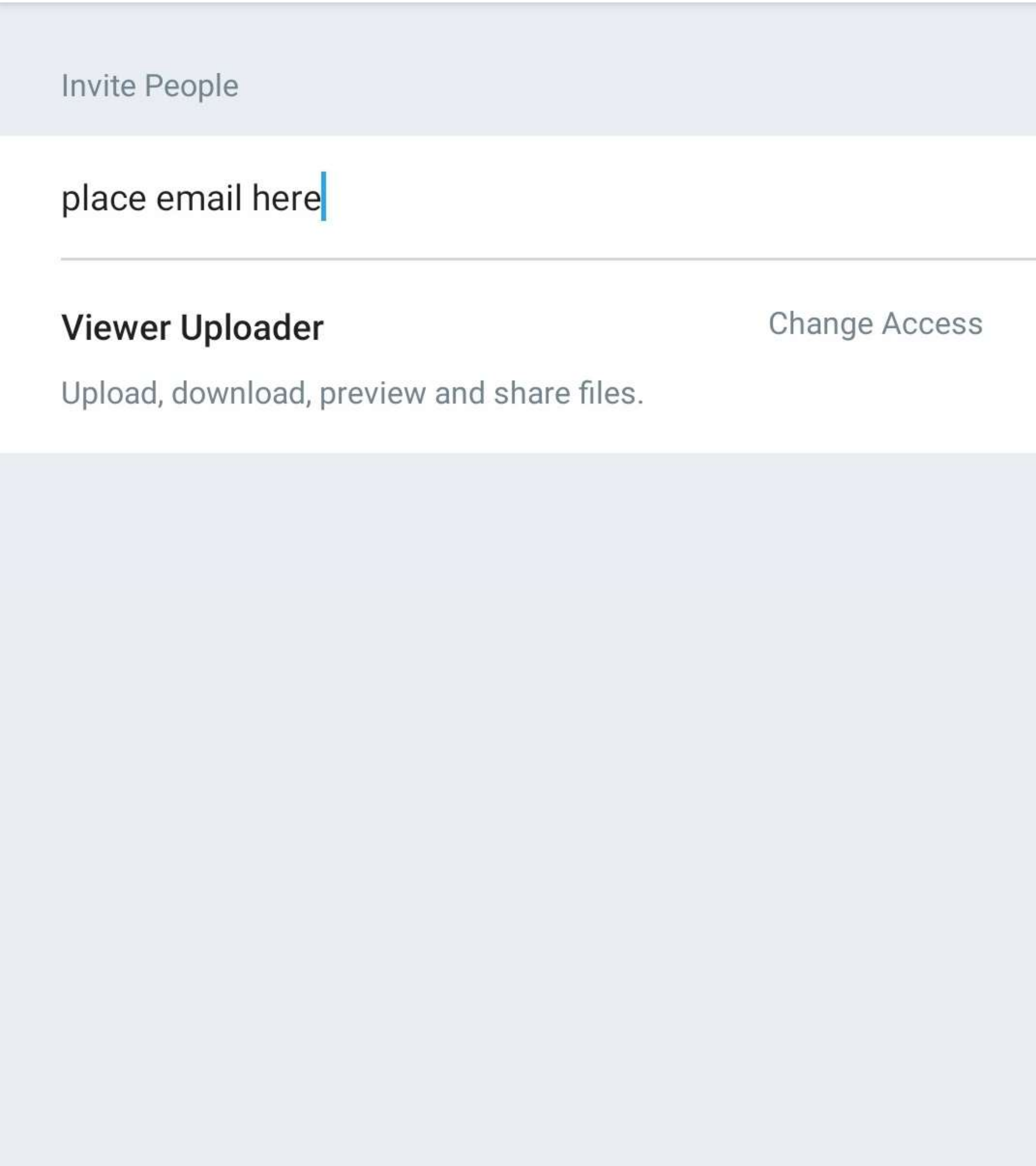
Automatic Emails to Explain the Process





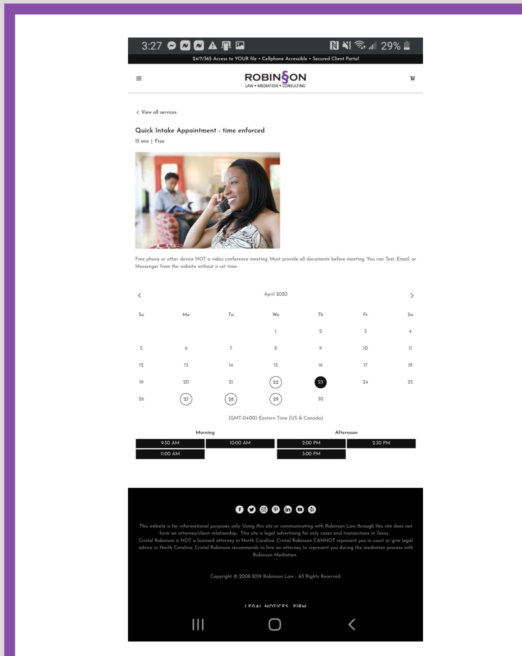


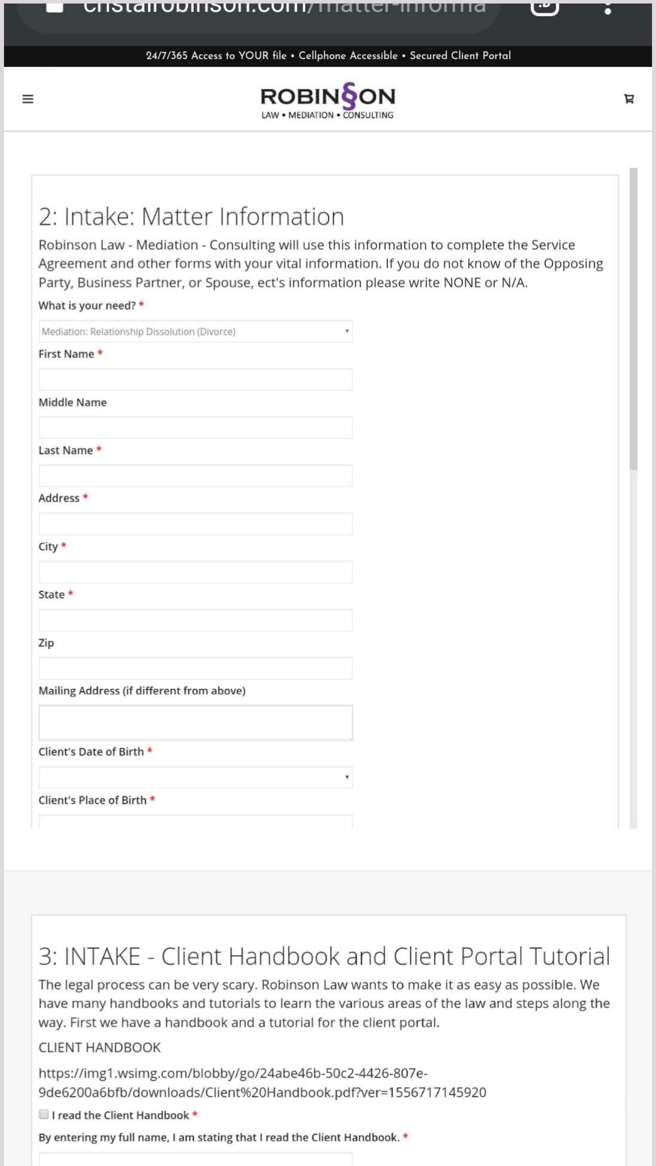
Manually Open Client Portal AFTER Conflict Check –
COULD DO IT BY ZAPIER



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

Get Appointment on Website





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

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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

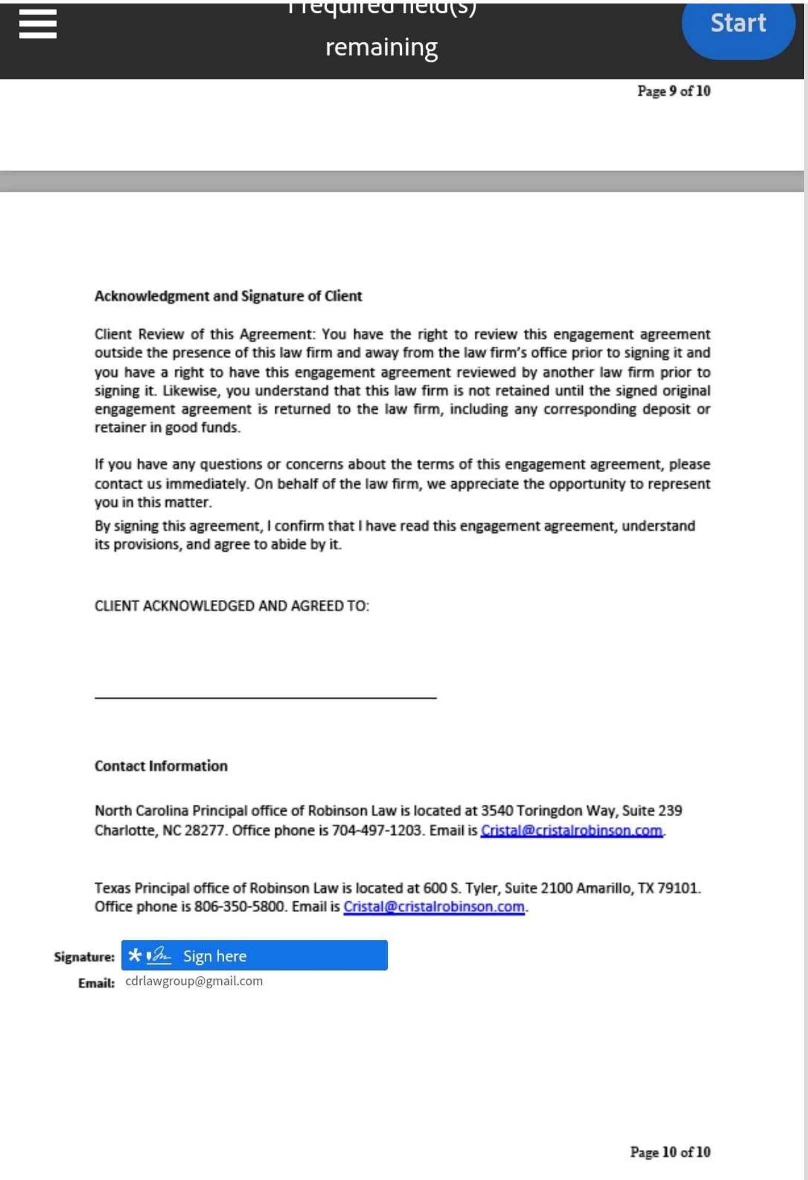
https://img1.wsimg.com/blobby/go/24abe46b-50c2-4426-807e-9de6200a6bfb/downloads/Client%20Handbook.pdf?ver=1556717145920

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

Send Legal Service Agreement for e-Signature through Adobe



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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@cristalrobinson.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@cristalrobinson.com.

Signature: Sign here

Email: cdrlawgroup@gmail.com

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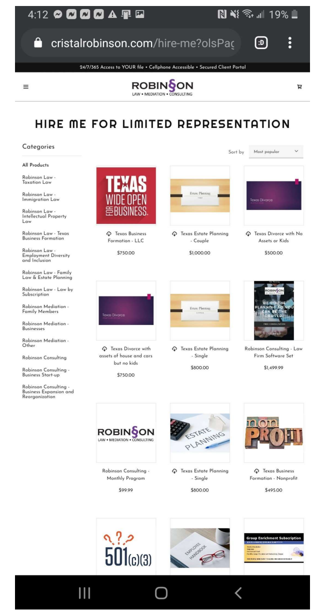
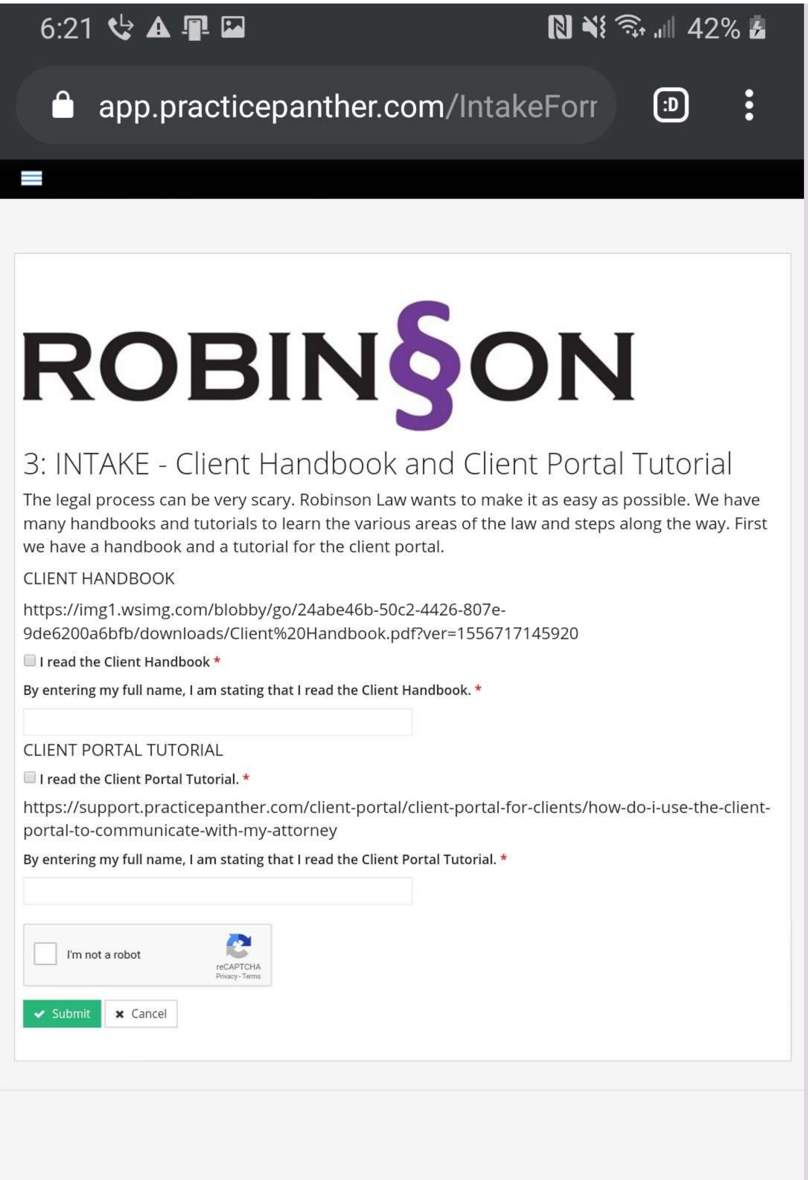
Hire Me Online for Limited Representation on Website




6:21 42%

app.practicepanther.com/IntakeForr

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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. *

I'm not a robot

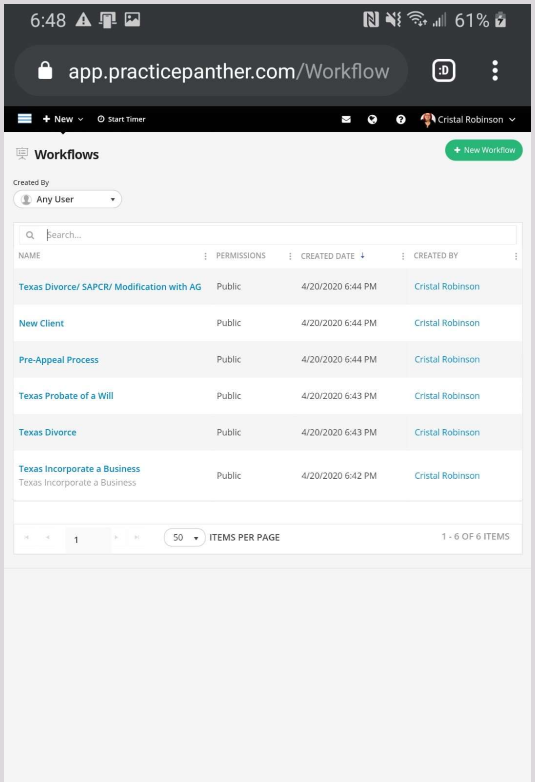
reCAPTCHA

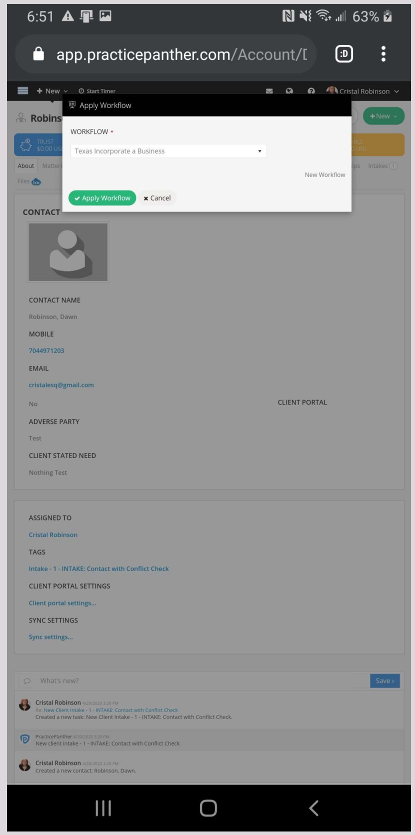
Privacy - Terms

Submit

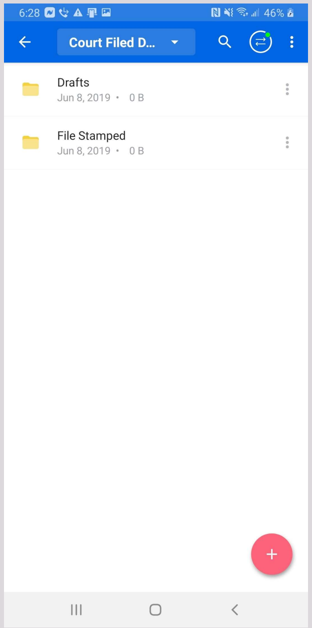
Cancel

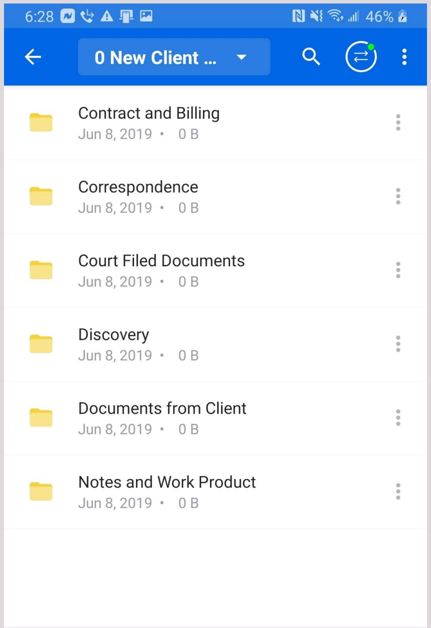
Send Verification of Client Handbook and Client Portal Tutorial

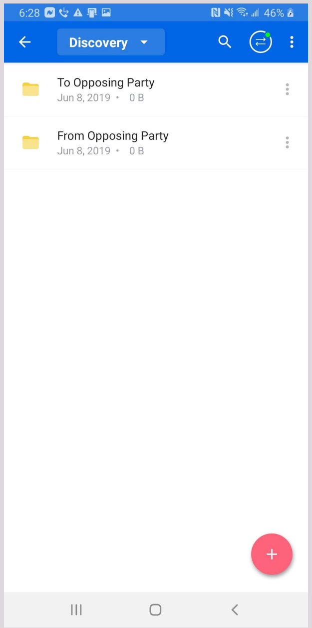




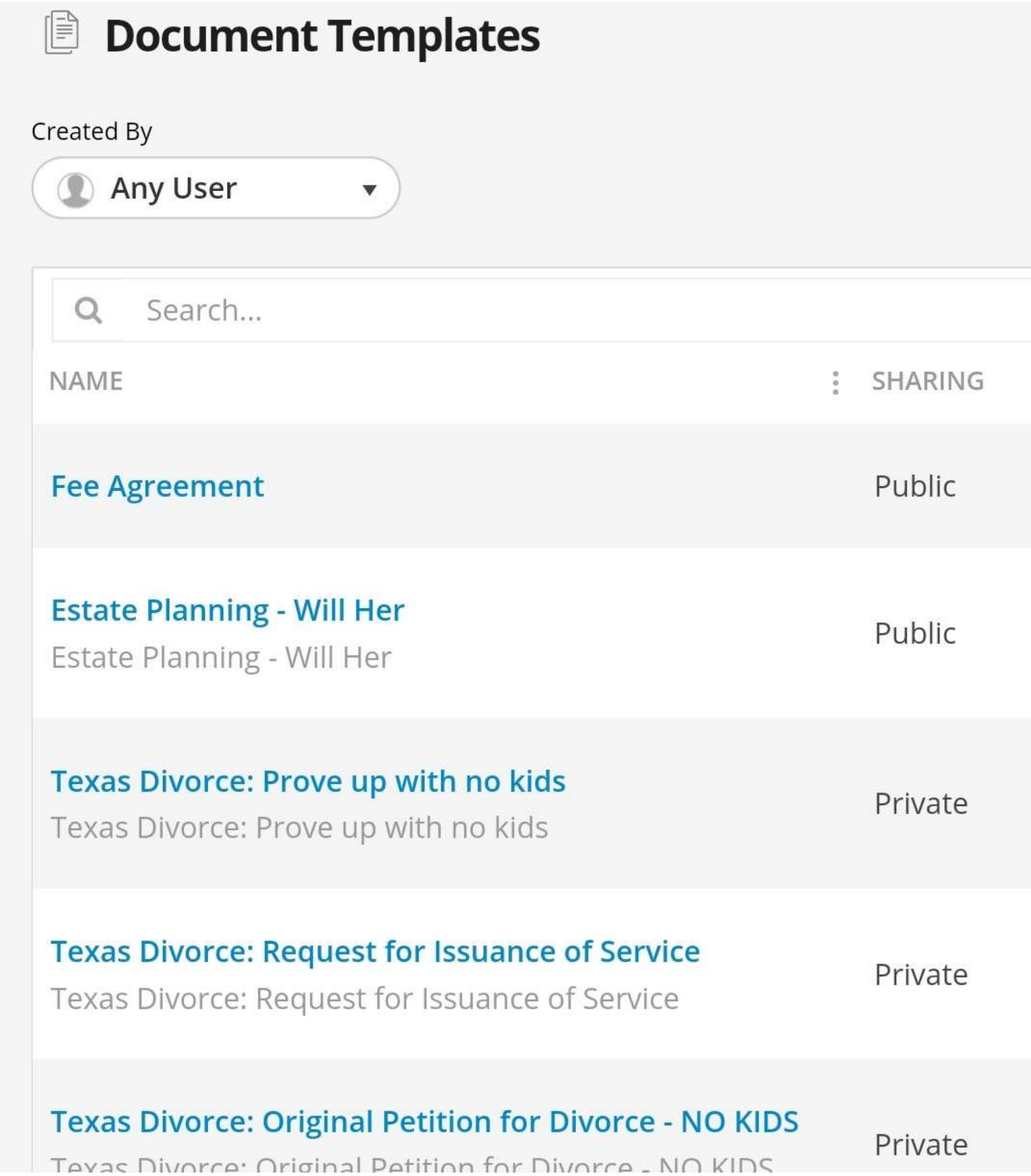
Manually Decide Appropriate Workflow – COULD DO IT BY ZAPIER





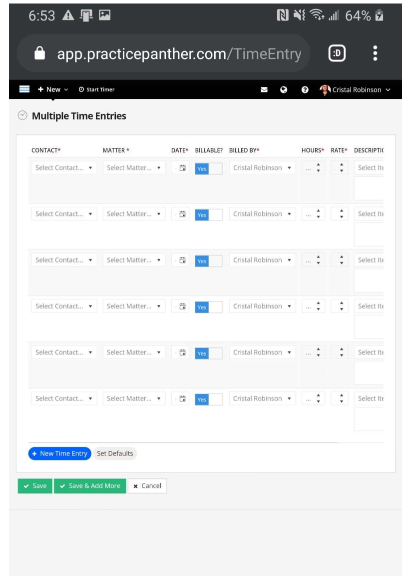


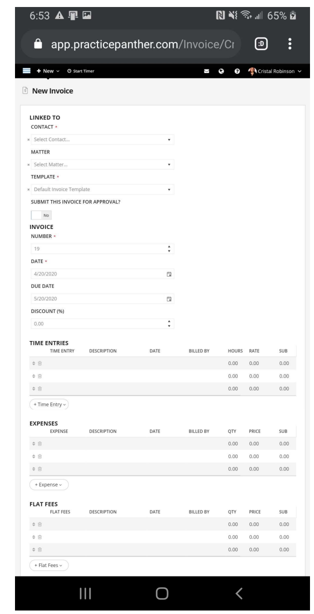
Manually Save Appropriate Folders to Box.com - COULD DO IT BY ZAPIER



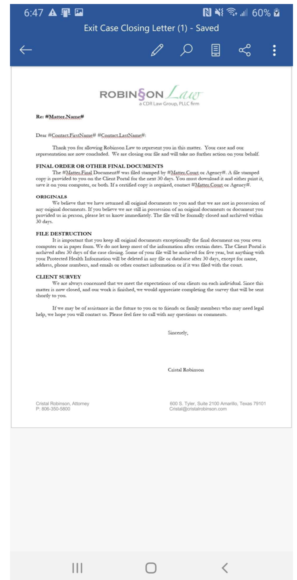
Complete the Forms, Process, and Steps in Workflow that was designed by laws and rules including Billing.

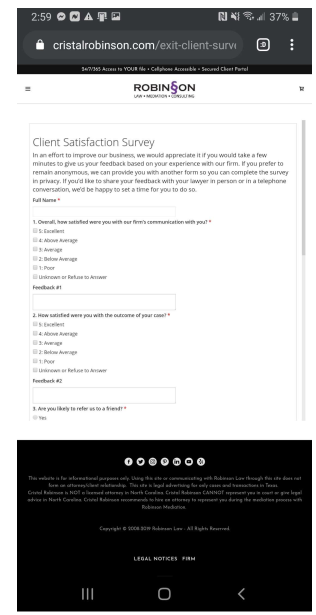
Time Entry & Billing





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, your 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

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- Pinterest
- TikTok

Twitter: @CristalRobinson