# TECHNOLOGY AS AN ASSET IN LEGAL PRACTICE

EXPLORING HOW TECHNOLOGY ENHANCES EFFICIENCY, ACCURACY, AND CLIENT SERVICE.



#### CASE MANAGEMENT

INTAKE DRAFTING

FRONT DESK

ADMINISTRATION TIME TRACKING

CALENDAR
TELEPHONE



**DISCOVERY** 

E-FILING

COMMUNICATIONS

BILLING

ZOOM

LEGAL RESEARCH

FIRM MANAGEMENT





























8amMyCase



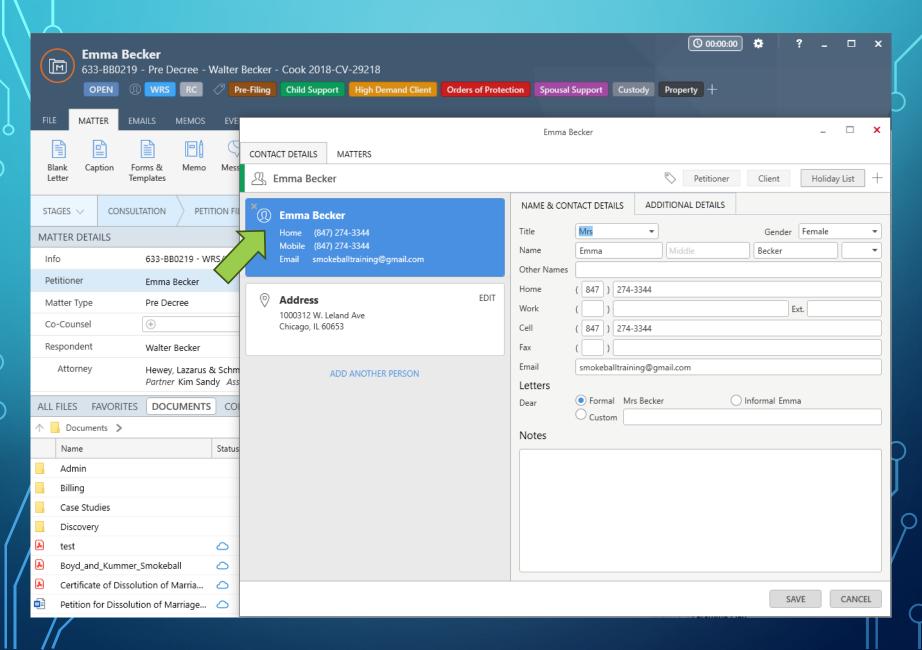


### CASE MANAGEMENT SYSTEMS

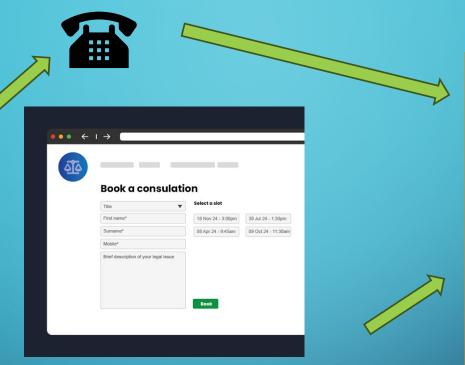


- Intuitive easy to navigate, easy to search
- Streamline workflows and track matters
- Improve firm visibility
- Centralize client and case data
- Improve client intake
- Better client communication
- Automate repeatable tasks
- Templates to improve accuracy and duplicate forms
- The BIG dream going paperless
- Track time and invoice regularly

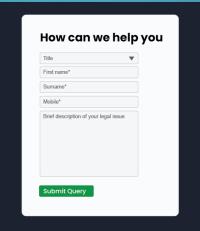
#### CMS - THE BIG PICTURE



#### CMS – CLIENT INTAKE







C

S

- Specific Intake forms to capture all relevant information
- Retainers
- Letters
- Emails
- Client Portals

#### CMS - TEMPLATES AND DRAFTING

- Letter Head
- Standard Letters
- Captions
- Drafted Pleadings
- Judicial Council Forms
- Deeds
- Electronic Signatures



- Service Lists
- Library of all county,
   state, and federal forms
- Common Forms Bond Applications, Zoom info
- Retainers



#### **CMS – INTEGRATIONS**

- E-FILE, E-SIGN, PROCESS SERVICE:
   Infotrack, Odyssey
- PAYMENTS AND ACCOUNTING: Law Pay,
   Quickbooks
- WEBSITE: Lawlytics
- RECORDING: Chicago Title
- TELEPHONE/RECEPTION: RingCentral, VXT, Smith or Answering Legal (24/7 reception)

#### **CMS – INTEGRATIONS**

- Zoom and Dropbox
- Al Assistants
- LEGAL DRAFTING: BriefPoint (Discovery)
- LEGAL DEADLINES: LawTool Box
- MICROSOFT 365: Outlook, Word, Excel
- Adobe
- Remote Legal Assistants

#### CMS - TIME TRACKING



- Timers, Manual Entry
- Automated
- Integrated with Word, Excel, Outlook, Telephones
- Ethical Considerations:Time Review Required

#### **ARTIFICIAL INTELLIGENCE IN PRACTICE**

- Opportunities: Efficiency in research and drafting, Case management integrations,
   Client communication support
  - Closed Source LLM –
     Tool specific, Westlaw,

     Nexis Lexis
- Risks & Cautions: Ethical considerations with open Al tools, Ensuring reliability and accuracy
  - ChatGPT, Open LLM
- Consequences: Sanctions,
   Discipline, Disbarment



#### LEGAL RESEARCH



Westlaw.

## Q&A SESSION