

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

DISCOVERY

TELEPHONE

E-FILE

COMMUNICATIONS

BILLING

ZOOM

LEGAL RESEARCH

FIRM MANAGEMENT



 **PRACTICEPANTHER®**

 **Essential Forms™**

InfoTrack

 **Briefpoint**


LexisNexis®

VONAGE

RingCentral

 **FILEVINE™**

 **SMOKEBALL**


ESQUIRETEK
Powering Legal Teams

 **rocket matter®**
by profitsolv

 **Clio**

LAWPAY®
AN AFFIRIPAY SOLUTION

Westlaw®

8am™ MyCase

HOTdocs

X

VXVT

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

INTEGRATION!!



EFFICIENCY

CMS - THE BIG PICTURE

Emma Becker
633-BB0219 - Pre Decree - Walter Becker - Cook 2018-CV-29218

OPEN **WRS** **RC** **Pre-Filing** **Child Support** **High Demand Client** **Orders of Protection** **Spousal Support** **Custody** **Property** +

FILE **MATTER** **EMAILS** **MEMOS** **EVE**

Blank Letter **Caption** **Forms & Templates** **Memo** **Mess**

STAGES **CONSULTATION** **PETITION FI**

MATTER DETAILS

Info	633-BB0219 - WRS/
Petitioner	Emma Becker
Matter Type	Pre Decree
Co-Counsel	+
Respondent	Walter Becker
Attorney	Hewey, Lazarus & Schm Partner Kim Sandy Ass

ALL FILES **FAVORITES** **DOCUMENTS** **CO**

↑ **Documents** >

Name	Status
Admin	
Billing	
Case Studies	
Discovery	
test	
Boyd_and_Kummer_Smokeball	
Certificate of Dissolution of Marria...	
Petition for Dissolution of Marriage...	

CONTACT DETAILS **MATTERS**

Emma Becker

Emma Becker
Home (847) 274-3344
Mobile (847) 274-3344
Email smokeballtraining@gmail.com

Address **EDIT**
1000312 W. Leland Ave
Chicago, IL 60653

ADD ANOTHER PERSON

NAME & CONTACT DETAILS **ADDITIONAL DETAILS**

Petitioner **Client** **Holiday List** +

Title **Mrs** **Gender** **Female**

Name **Emma** **Middle** **Becker**

Other Names

Home (847) 274-3344

Work () Ext.

Cell (847) 274-3344

Fax ()

Email smokeballtraining@gmail.com

Letters

Dear ☒ **Formal** Mrs Becker ☐ **Informal** Emma

☐ **Custom**

Notes

SAVE **CANCEL**

CMS – CLIENT INTAKE

CLIENT



Book a consultation

Title **Select a slot**

First name* 18 Nov 24 - 3:00pm 30 Jul 24 - 1:30pm

Surname* 08 Apr 24 - 9:45am 09 Oct 24 - 11:30am

Mobile*

Brief description of your legal issue

Book



How can we help you

Title

First name*

Surname*

Mobile*

Brief description of your legal issue

Submit Query

C
M
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
- Estate Plans
- 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
- AI 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 AI tools, Ensuring reliability and accuracy
 - ChatGPT, Open LLM
- **Consequences:** Sanctions, Discipline, Disbarment



LEGAL RESEARCH



The background is a blue gradient. In the corners, there are white line-art patterns resembling circuit boards or neural networks, with lines and small circles connecting them.

Q&A SESSION