

OSB Professional Liability Fund presents

# Unlocking Success: Strategies to Elevate Your Practice

**Wednesday, April 24, 2024**  
**North Bend, Oregon**  
**9:00 am – 10:30 am**

MCLE ID 108428  
1.5 Practical Skills Credits

Speakers: **Rachel Edwards**  
*Practice Management Attorney*  
*OSB Professional Liability Fund*

**Monica Logan**  
*Practice Management Attorney*  
*OSB Professional Liability Fund*

# CLE Materials

- PowerPoint Slides
- Additional Resources

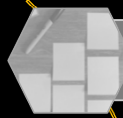
# Unlocking Success: Strategies to Elevate Your Practice



Professional  
Liability Fund

Presented by:  
Rachel Edwards, Monica Logan, and Kalia Walker  
*Practice Management Attorneys*  
OSB Professional Liability Fund

Strategies &  
Tools to  
Improve:



Office Infrastructure



Client Communication



Calendaring & Efficiency



Document Drafting



File Management

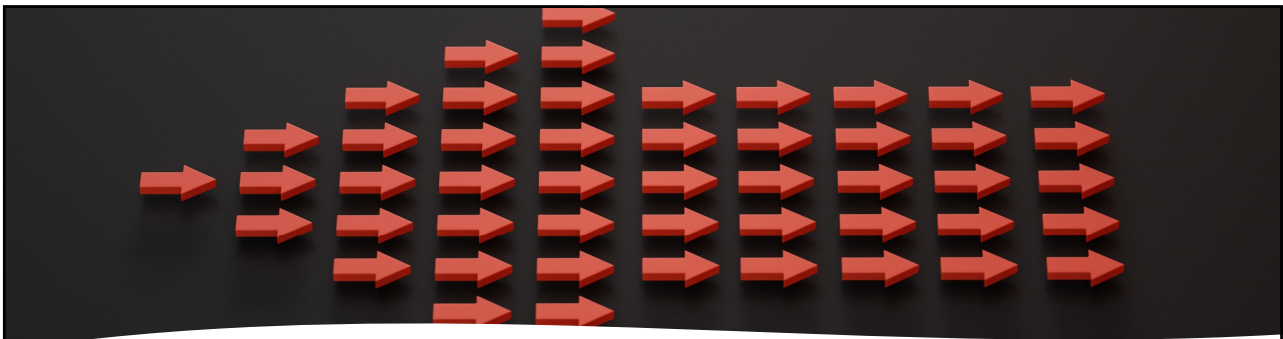


Utilizing AI



# “Lean on Me”

## Building Reliable Office Infrastructure



### Problematic Office Infrastructure

- Inconsistent practices
- Lack of internal communication
- Lack of internal support
- Neglect and procrastination



## Create Consistent Practices

- First assess your existing resources
- Review current steps
- Streamline by inserting technology to replace parts of process
- Strategize better utilization of current resources



## Process Mapping

- Visually describe the flow of work
- Highlight pain points and provide guidance
- Current process vs. ideal process



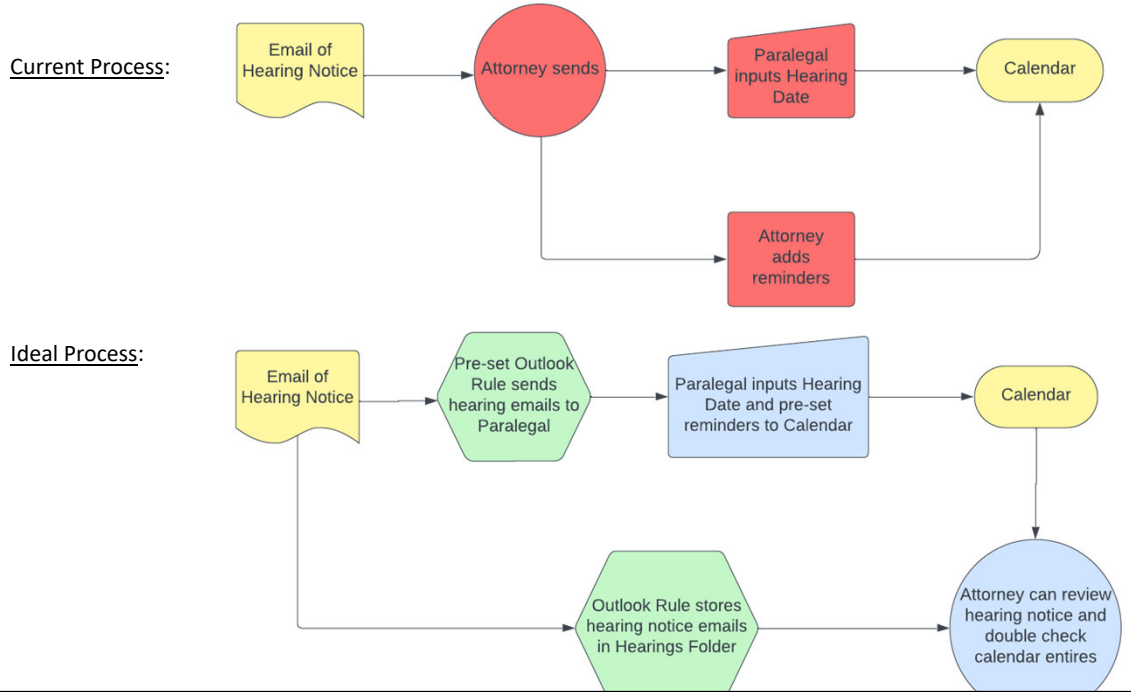
Lucidchart



creately



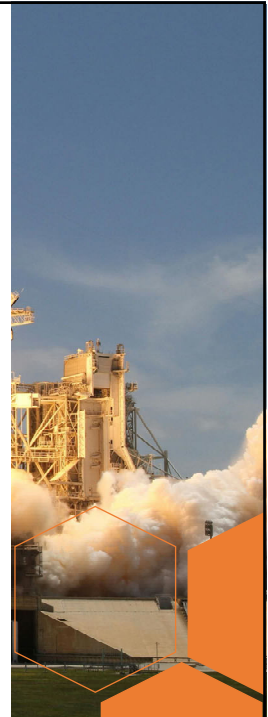
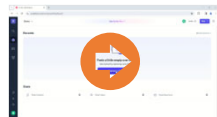
# Process Map Example



## Launching Your New System

- Keep written procedures in a shared location and review periodically
- Finding the solution takes time
- Utilize feedback and other resources

Scribe





## Conquer Internal Communications

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- Identify policies for different types of conversation spaces
- Emphasize opportunity for planning, commentary, and check-in with each other



MS Teams



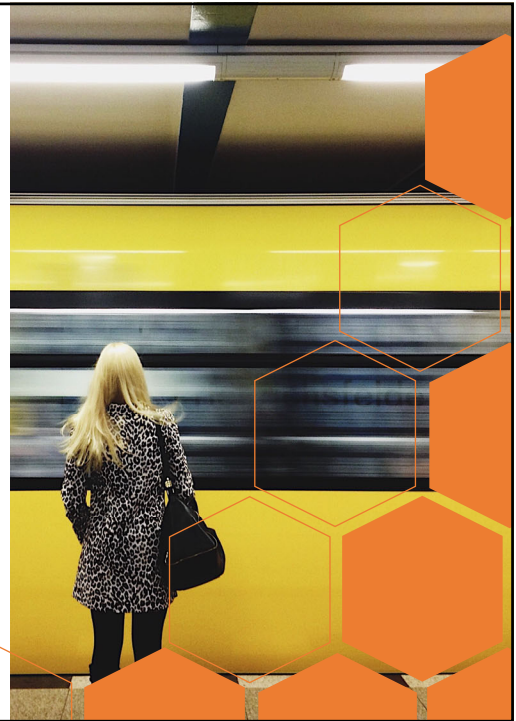
Google Chat

## Foster Staff Excellence

- Consistently onboard new staff
- Check in with staff regularly
- Delegate clearly
- Coach employees to improve
- Analyze available motivation practices

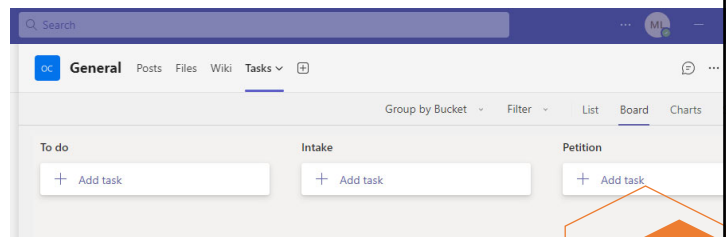
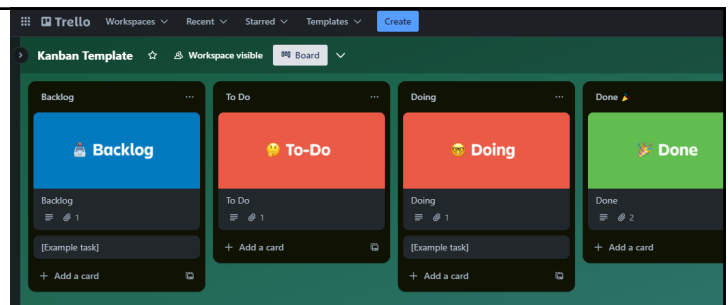
# Help Amidst Procrastination

- Identify root causes
- Explain OAAP availability or mental health employee benefits
- Avoid distractions and create focus



# Software Can Lend a Hand

- Track tasks individually and for team
- See task status immediately
- Set due date and subtasks



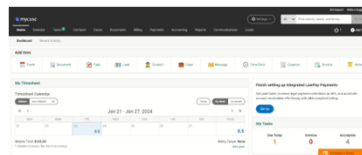












## Practice Management Software

- Database to compile matter details
- Centralizes contacts, documents, billing, case events (calendar), and tasks
- Back and front end of firm operations

## Practice Management Software Options



Cloud-Based Practice Management Software		Pricing	Client Relationship Management	Client Mobile App	Text Messaging	Client Portal	Online Payments	Event Reminders
	\$69/user/mo	Clio Grow (+\$49/user/mo)	✓	✓	✓	✓	✓	✓
	\$69/user/mo	✓	✓	✓	✓	✓	✓	✓
	\$89/user/mo	✓		✓	✓	✓	✓	✓
	\$89/user/mo	✓	✓	✓	✓	✓	✓	✓
	\$69/user/mo	✓	✓	✓	✓	✓	✓	✓
	\$149/user/mo	✓	✓	✓	✓	✓	✓	
	\$89/user/mo	✓	✓	✓	✓	✓	✓	✓
	\$99/user/mo	✓		✓	✓	✓	✓	





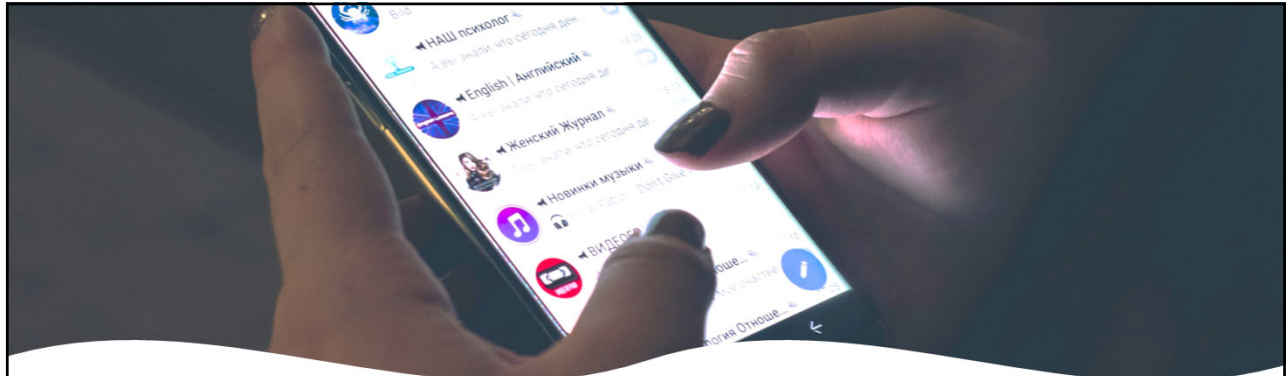
## Communication Challenges

- Failure to set and manage client expectations
- Failure to build trust with clients
- Lack of and/or ineffective communication



## Set and Manage Client Expectations

- Must be done at each level of the case from initial consult to disengagement
- Clearly define scope of representation and fees
- Send engagement, nonengagement, and disengagement letters



## Create a Communication Policy

- Clearly specify communication hours
- Describe “emergency” in detail
- Stick to the policy

## Must Build and Maintain Trust

- Let them share their story
- Show empathy
- Communicate clearly by avoiding legal jargon
- Respect each other’s time





## Choose Ideal Communication Methods

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- Who has access to what technology?
- What is the topic of conversation?
- Need for document sharing?



## Maximize Videoconferencing

- Convenient and personable option for meeting with clients
- Benefits include screen share of documents, chat, whiteboard, live caption
- Be mindful of security

zoom



webex  
by CISCO

coffee

GoTo

## Consider Voice Over Internet Protocol (VOIP) or Texting

### VOIP

- Route calls through desk phone, computer, or mobile device
- Makes communication easier if working remotely



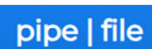
### Texting

- Texting can be a helpful method of communication
- Choose a secure program



## Communicate and Share Using Client Portals

- Benefits include encrypted two-way messaging and document sharing
- Helps with faster payment, scheduling and task management with clients



**PRACTICEPANTHER** + New Start Timer Rachel Edwards

Search Home Matters Contacts Calendar Time Entries Billing Payments Activities Documents Reports Privacy

### Dashboard

Date Range: 2/1/2024 - 2/29/2024

TRUST \$0.00 USD PAID \$0.00 USD DUE \$2,465.00 USD BILLABLE \$0.00 USD

REDEEM \$150 CASH BACK! ENABLE PANTHERPAYMENTS

TIMER 00:00:00

QUICK CREATE

- New Contact
- New Matter
- New Event
- New Task
- New Note
- New Call
- Send Message
- Track Time
- Add Expense
- New Intake
- New Invoice
- New Payment
- New Flat Fee

RECENT ACTIVITY

What's new? Save

0 ITEMS PER PAGE NO ITEMS TO DISPLAY

FEBRUARY 2024

Su	Mo	Tu	We	Th	Fr	Sa
28	29	30	31	1	2	3
4	5	6	7	8	9	10
11	12	13	14	15	16	17
18	19	20	21	22	23	24
25	26	27	28	29	1	2
3	4	5	6	7	8	9

Monday, February 26, 2024

Date Calculator

YOUR AGENDA Rachel Edwards's Chat

## Maintain Regular and Effective Communication

- Schedule regular communication with clients
- Follow up with clients after to ensure understanding
- Build communication policy into your workflow



# Use Scheduling Software

- Use auto-replies or email signature specifying when emails and voicemails checked
- Consider only scheduled client meetings
- Use scheduling software



acuity:scheduling



## Virtual Staffing

	Pricing	Focus on incoming calls/intake	Schedule appts.	Outbound calls	Email mgmt.	File mgmt.	Document drafting	Legal research	Billing and bookkeeping	Social media and marketing
	\$299-\$1,199/mo	✓	✓							
	\$64-\$1,794/mo	✓	✓	✓						
	\$235-\$1,640/mo	✓	✓							
	\$375-\$675/mo	✓	✓	✓						
	\$299-\$2,350/mo	*includes virtual receptionist services	✓	✓	✓	✓	✓	✓	✓	✓
	\$360-\$1,255/mo	*includes virtual receptionist services	✓	✓	✓	✓	✓	✓	✓	✓
	See website	*includes virtual receptionist services	✓	✓	✓	✓	✓	✓	✓	✓
	Quoted	*includes virtual receptionist services	✓	✓	✓	✓	✓	✓	✓	✓



# Automate Your Communication

- Use integrations between tools to connect apps
- Practice management software or standalone to create your own integrations

Practice management software:



Standalone:



Power Automate

# Zapier

1. Click on Trigger.
2. Choose the app that creates the trigger. You'll be asked to sign into your app account if you haven't connected to it before.
3. Then customize your trigger event to trigger the next action.
4. Click on Action. You'll again pick an app.
5. Then select the action you want your Zap to perform after the trigger occurs.

1. Trigger

An event that starts your Zap

2

Change trigger

A trigger is an event that starts your Zap

3

4

5

1. Microsoft Office 365

2. Microsoft Outlook

Event (required)

Choose an event

Calendar Event Start

Triggers at a specified time before an event in your calendar starts.

New Calendar Event

Triggers when a new event is created in your calendar.

New Contact

Triggers when a new contact is added to your account.

New Email

Triggers when a new e-mail is received in your inbox.

Updated Calendar Event

Triggers when an event is updated.

2. Action

An event a Zap performs after it starts

Create Draft Email

Creates a draft of an email that can then be reviewed.

Create Event

Create an event in the calendar of your choice.

Delete Event

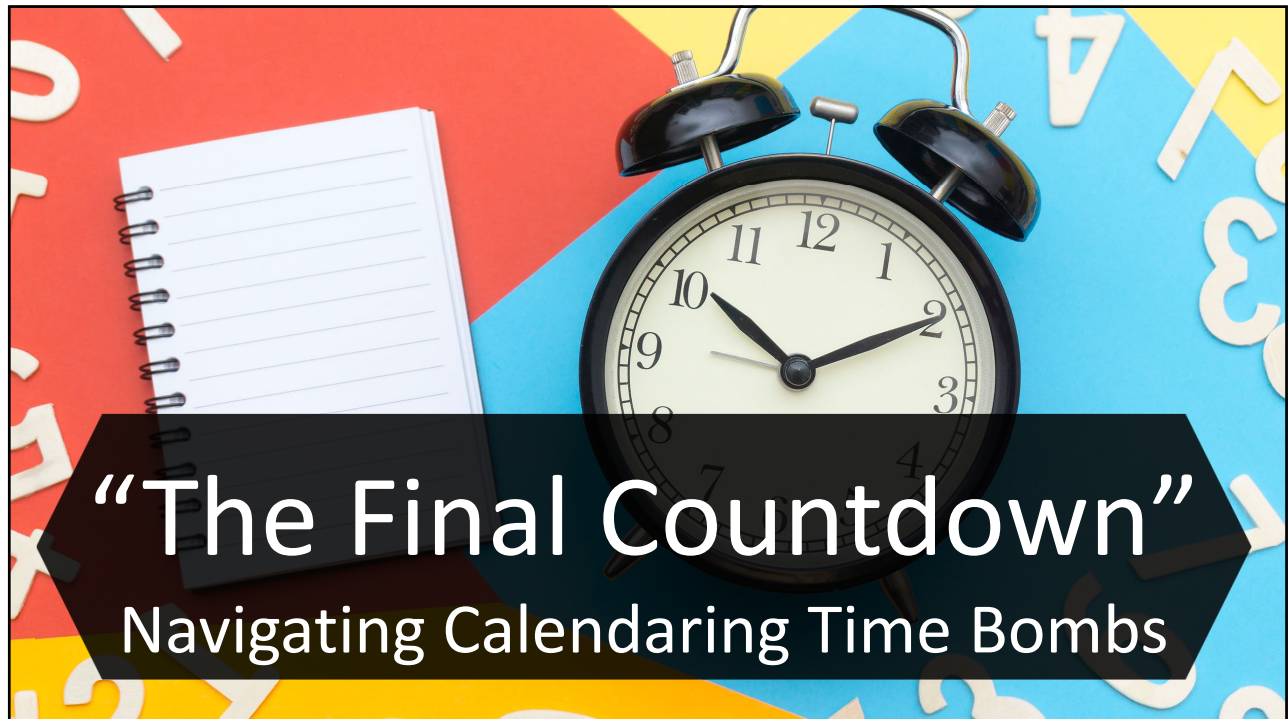
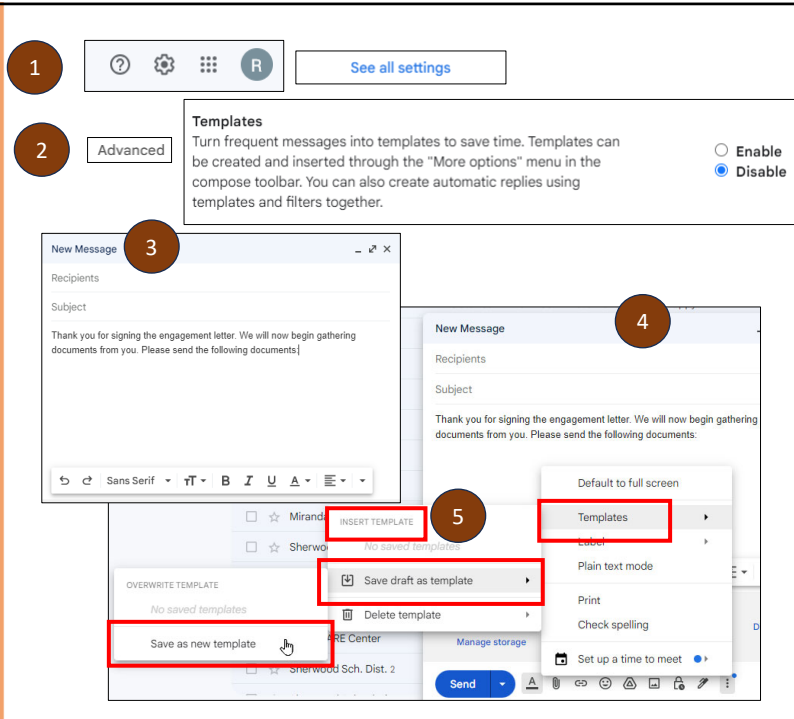
Deletes an existing event.

Send Email

Send an email from your Outlook account.

# Gmail Templates

1. Click Settings, then See all settings.
2. Then click Advanced. In the templates section, select Enable and Save Changes.
3. Click Compose and enter your template text.
4. Then click More, then Templates, then Save draft as template, then Save as new template.
5. To insert a template, click Compose, More, then Templates, Insert Template.





## Missed Deadline Factors

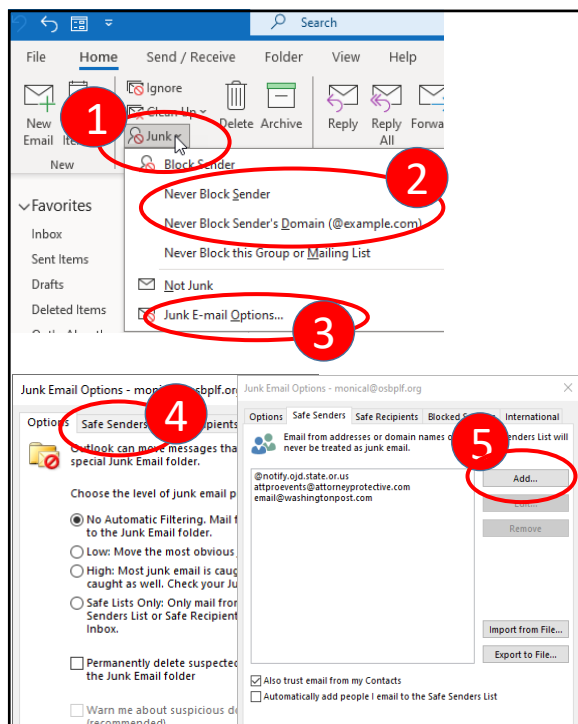
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- Not implementing good calendaring habits
- Incorrectly calculating deadlines
- Mismanaging your time



## Good Calendaring Habits

- Create a routine for entering dates immediately
- Have one main point of entry
- Sync calendars for easy access



## Add to Safe Sender List

1. If you select a court email, find the Junk menu under Home.
2. Click on the drop-down menu, and you can put that person or that email's domain on the safe sender list.
3. If you do not have an email in front of you, follow steps one and two, but click Junk E-mail Options.
4. A new menu will pop up that have multiple submenus. Click Safe Senders.
5. You will see a list of already approved safe senders. If "@notify.ojd.state.or.us" is not on the list, click Add and follow the prompts.

## Correctly Calculate Deadlines

- Always double check entries
- Calculate manually or with calendaring software

Standalone:



LawToolBox.com

Practice Management Software:



CARET

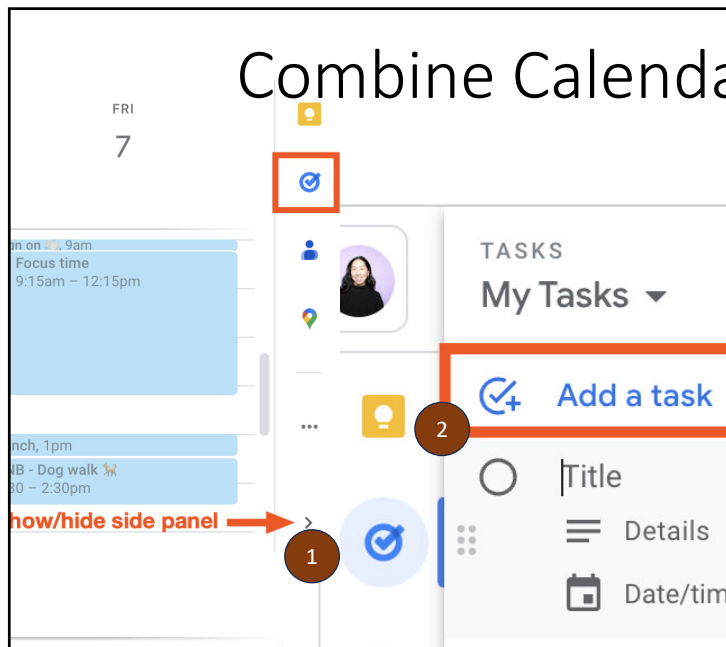




## Count Backwards from Deadlines

- Set due date and work through steps backwards
- Add time for acceptance or errors
- Set follow up as a task with a due date

## Combine Calendar and Tasks



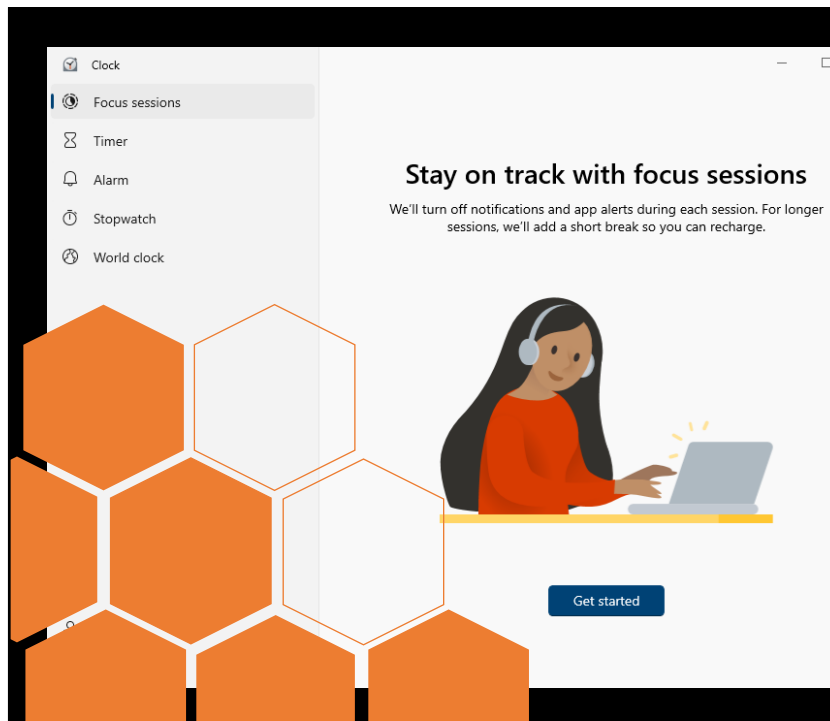
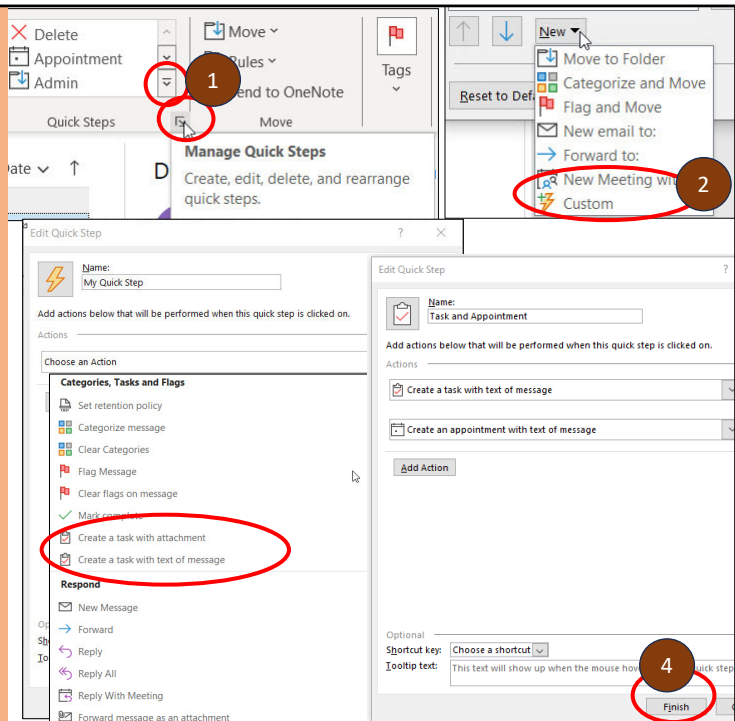
1. Find the right-hand side menu in your Calendar. Click the small arrow at the bottom to open side panel.
2. Find and click on the circled checkmark icon on. Here you will be able to see all your tasks as well as add a task.
3. Any new tasks with a date due will automatically appear.
4. In your email, if you open the task menu in the same right panel, you can drag an email and drop it into Tasks to create a task with the body being that of the email.

Images brought to you by [Zapier](#) Blog: [HOW TO USE GOOGLE TASKS](#)

# Quick Steps

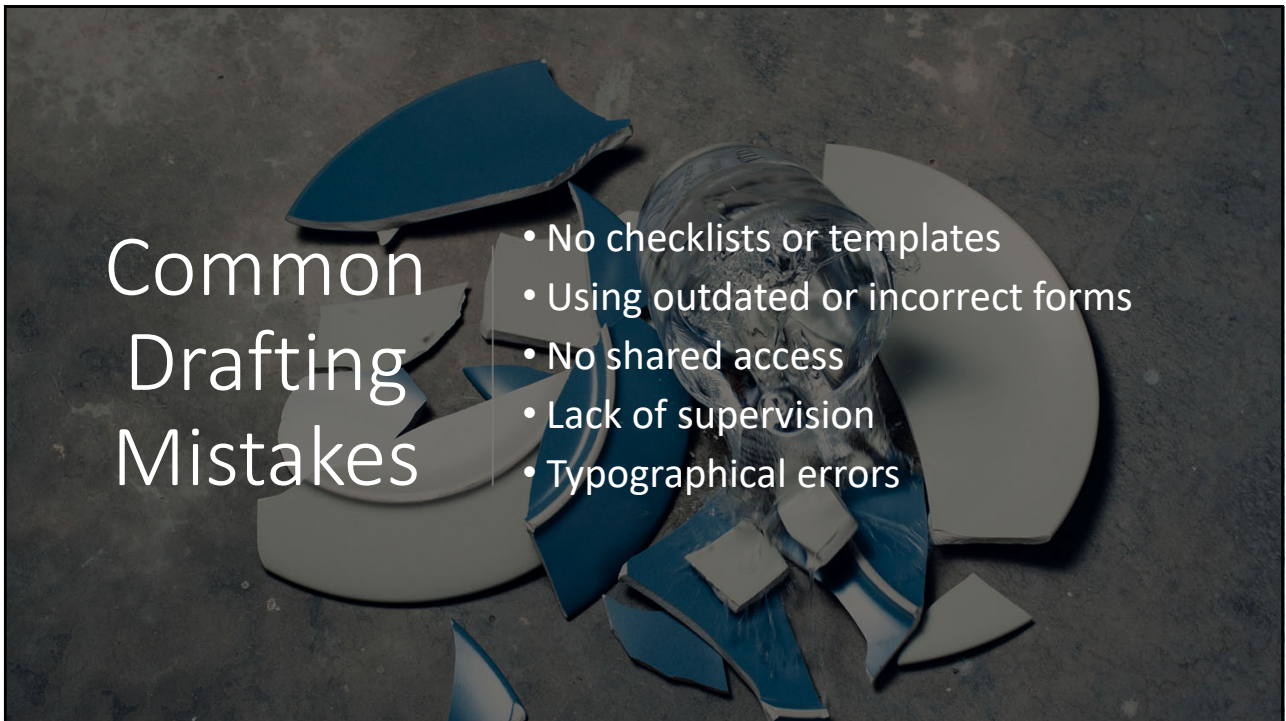
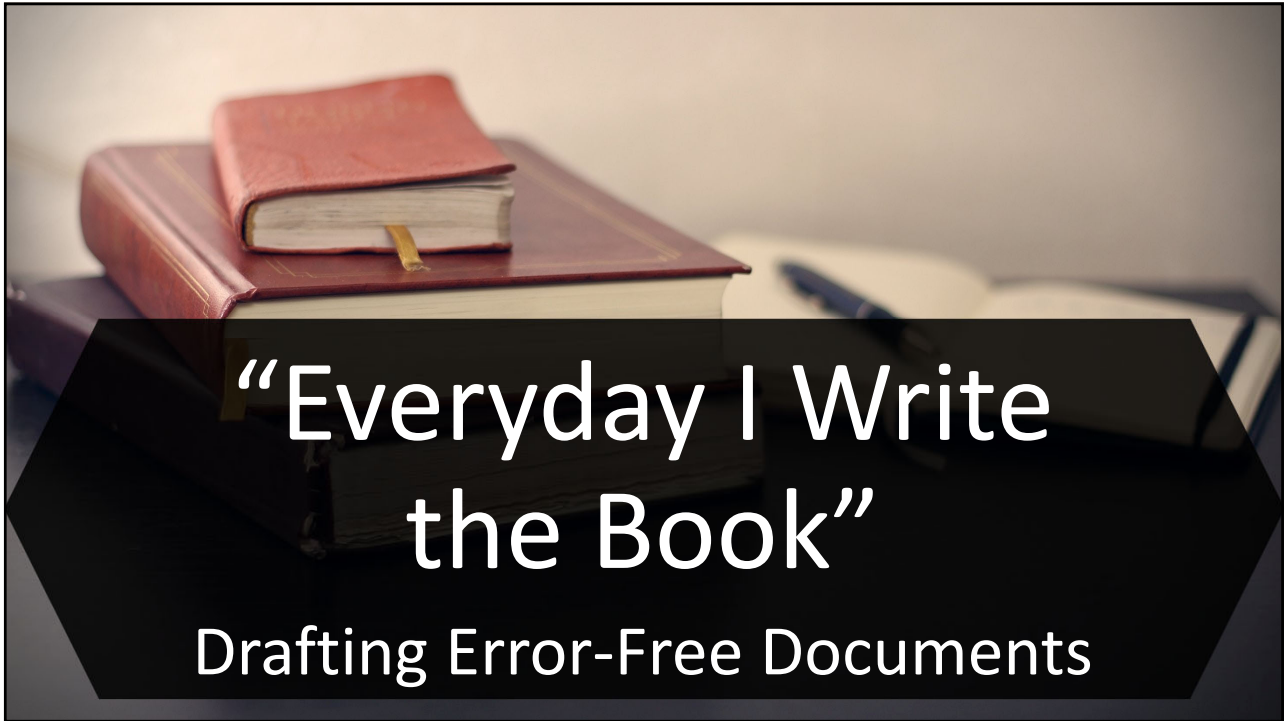


1. Click the arrow at the bottom right or the expand arrow to find Manage Quick Steps.
2. On the new menu, click New at the bottom left. Pick a preset option, or you can click Custom to see all the available actions.
3. If you click Custom, an Edit Quick Step menu will appear. Click the drop-down arrow for all actions.
4. When you click an action, you will get to customize it. Click Finish to finalize.



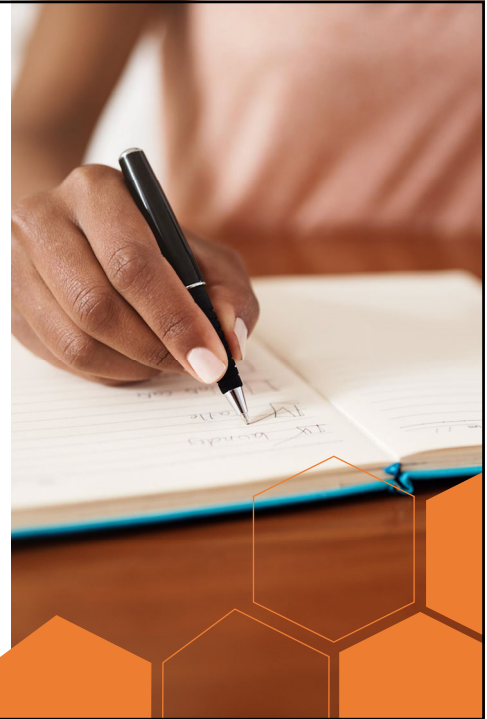
## Time to be Found

- Focus mode
- Timer to countdown
- Stopwatch to count up
- Alarm to stop and stretch



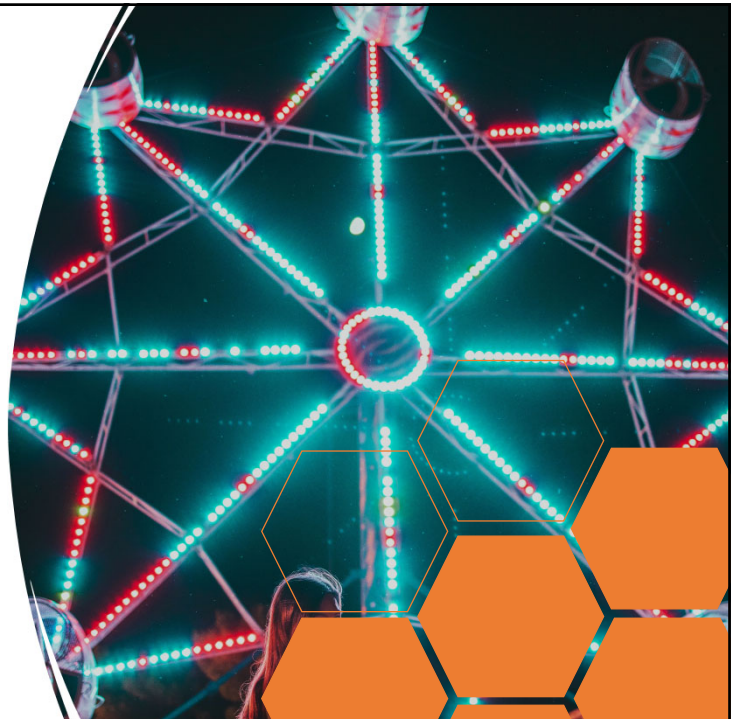
## Create Checklists & Templates

- Draft completion checklists for commonly used documents
- Use software to develop document templates
- Make lists and templates easily accessible



## Centralize Access

- Utilize document collaboration applications (Adobe Collaboration Synchronizer, Google Docs, Microsoft Teams, etc.)
- Develop system to keep track of document versions (shared folder, OneDrive)
- Use software to compare different documents







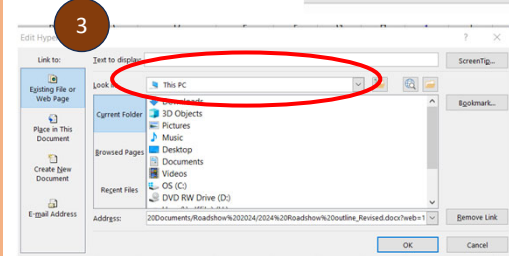
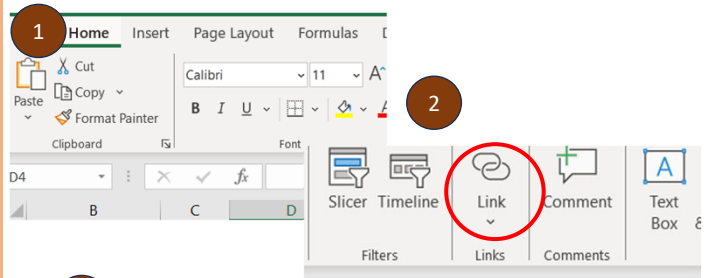
## Update Form Documents

- Obtain current copies of applicable court rules
- Review new legislation
- Update templates to reflect changes in applicable rules and law

## Insert Files into Excel



1. Click Insert.
2. Next, click Link in upper right corner of the screen and a text box should appear.
3. Use the text box to select your preferred document. Click OK.
4. You can now access the selected document automatically by clicking the link within your spreadsheet.



Request #	Document Type	Dates	Document Link	Comments
1	Word	2022	Draft Contract Agreement	
2	Word	2021		
3	Word	2020		



## Supervise Attorneys & Staff

- Schedule regular employee check-ins
- Maintain checklists for supervision process
- Set aside time to review work product

## Document Automation

Standalone  
Software

Practice Management  
Software

 **gavel**

 mycase

 **PRACTICEPANTHER**

**Knackly**

**HOTdocs**  
by CARET

 **Clio**

 **Woodpecker**

**actionstep**

# Quick Parts

1. Open a new document and enter in the text you would like to save as a Quick Part. Highlight it.
2. Go to the Insert Tab and click Quick Parts.
3. A drop-down menu should appear. At the bottom, click Save Selection to Quick Part Gallery.
4. Complete the information regarding the text and click ok.
5. You can now automatically fill in the text to new documents by clicking the text block to add under the Quick Parts Menu.

# Spell Check Tip

- Microsoft Word does not spell check words in all caps
- Under the File menu, click on options. On the left-hand side of the options dialog, click on Proofing
- Uncheck the box next to Ignore Words in UPPERCASE



“No More Tears (Enough is Enough)”  
Improving Your File Management



## Common Challenges

- Unable to quickly locate documents
- Documents spread across locations and devices
- Insufficient backup process
- No proper retention/destruction policy

# Assess File Management Needs

- Physical vs. electronic files
  - Document management vs. document storage
  - Security and backups
  - Client preference
- 



## File Storage

- Electronic
  - Hard Drive
  - Local Server
  - Cloud
- Paper

# File Storage Tips

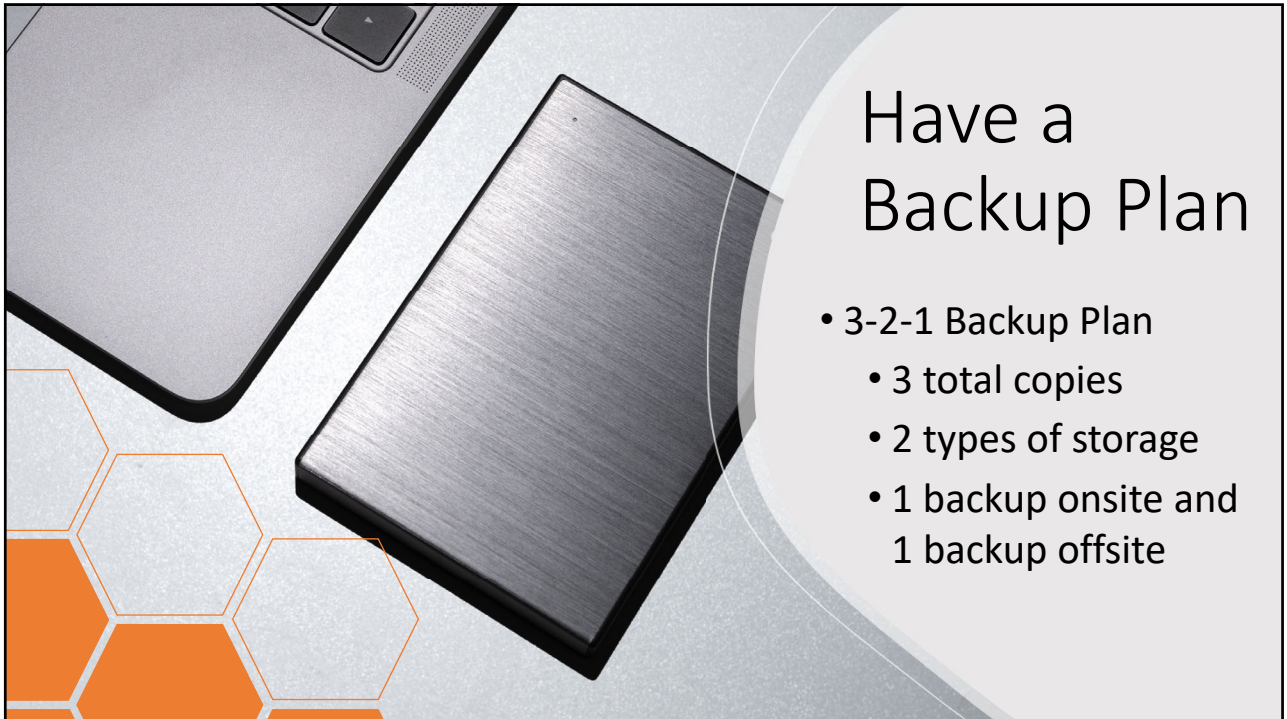
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- Avoid 'paper-only' files or documents
- Properly safeguard both paper and electronic files
- Return original documents & property to clients immediately



# Have a Backup Plan

- 3-2-1 Backup Plan
  - 3 total copies
  - 2 types of storage
  - 1 backup onsite and 1 backup offsite



## Physical device for backing up

### Hardware:

- External hard drive
- External solid state drive (SSD)
- Backup server
- Portable drive

### Software:

- Native: Windows Backup; Mac Time Machine
- 3<sup>rd</sup> Party: Acronis; AOMEI Backupper; EaseUS Todo Backup

## Physical device w/ built-in backup software

- Seagate Backup Plus portable drive
- Western Digital My Passport portable drive
- Samsung T5 SSD portable drive
- Netgear ReadyNAS (network attached storage)
- Western Digital My Cloud (network attached storage)

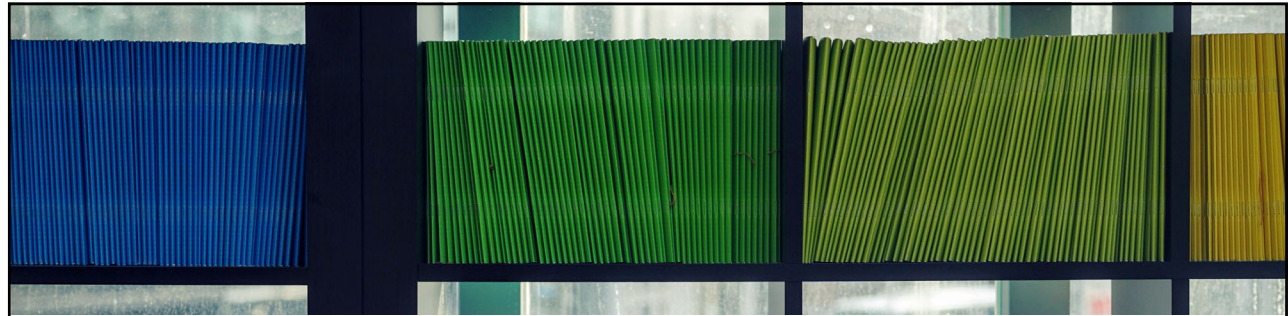
## Cloud

- Backblaze • Carbonite • CrashPlan • SOS Online Backup



## Backup Tips

- Make it automatic and regular
- Test regularly
- Review your backup policy annually



## File Retention Guidelines

- Retain copy of file for 10 years
- Research and evaluate additional factors: practice area, case type, and client
- Treat digital and paper files the same!
- See our *File Retention and Destruction Guidelines*

## Remote Work

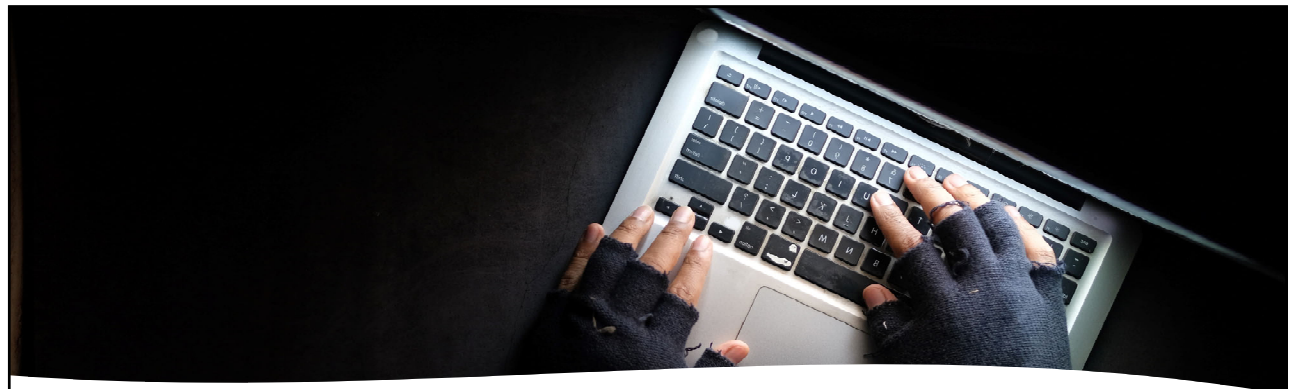
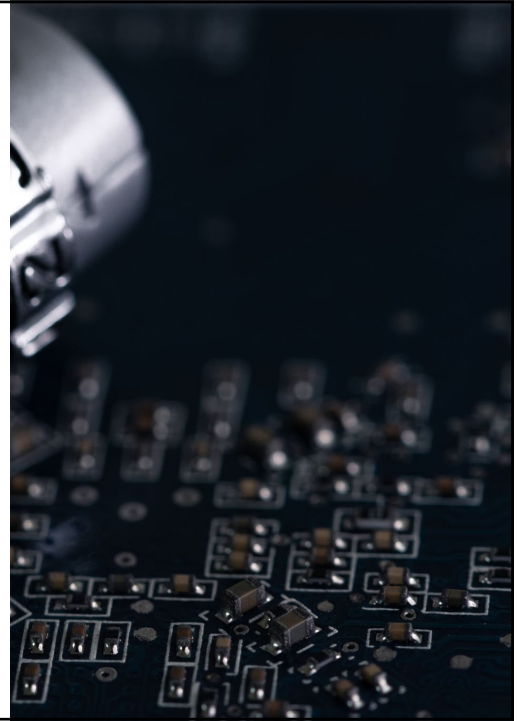
- WiFi Protected Access (WPA 2 or 3)
- Use strong passwords and MFA
- Use law firm devices on the home network rather than taking control of a home machine





# Cybersecurity Tips

- Develop a data breach protocol
- Do not share or reuse credentials
- Use firewalls and anti-spyware
- Purchase cyber liability insurance



Have I  
Been  
Pwned?

- Confirm whether your personal data has been compromised by a data breach
- <https://haveibeenpwned.com>



## Why does AI matter?

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- Helpful features to streamline time and costs
- Will revolutionize how we think and perform tasks
- Will change how lawyers run their business

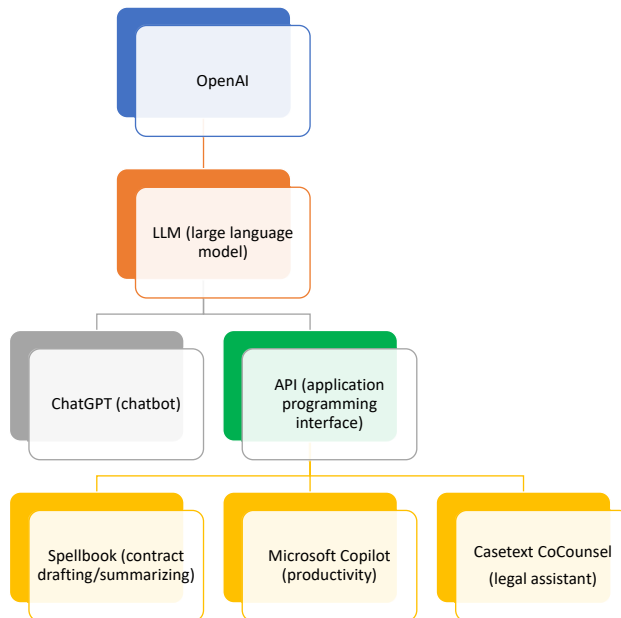




# What is generative AI?

- Computer program that can generate new content
- Provides a response based on its training and user prompts
- Purpose is to mimic human intelligence

## Overview of OpenAI's LLM



<https://theresanaiforthat.com/>



## What is generative AI good for?

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- Summarizing information
- Organizing information
- Improving, condensing, or editing text
- Helping you brainstorm and be more creative

What can go wrong?

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Unsure of sources

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Difficulty handling unclear prompts

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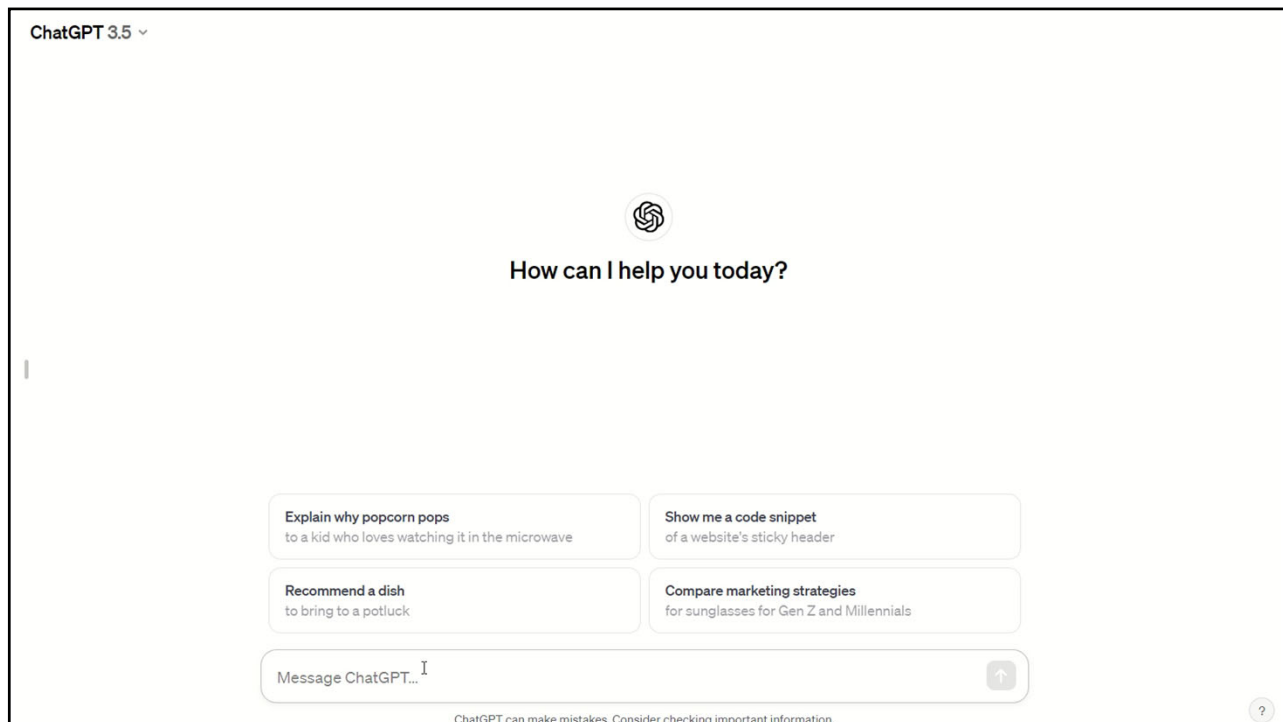
Hallucinations

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Privacy concerns

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Copyright infringement



# Tips to Avoid Malpractice

- Understand the AI tool before using
- Anchor it to a source of truth
- More detail given, better answers
- Verify accuracy and reliability of data
- Understand confidentiality guardrails
- Establish very clear policies and procedures for using AI technologies
- Create initial and ongoing training protocol on AI tool usage

# AI is Here to Stay

- Will be infused in everything we do
- Will cut costs and time
- Determine how best it can assist you



## Resources



Professional Liability Fund

<https://www.osbplf.org> > Services  
503-639-6911 | 800-452-1639

- Practice Management Assistance Program (PMAP)
- Claims Attorneys
- Practice Aids
- Books
- CLEs
- *InPractice* Blog
- Excess Coverage
- *InBrief* Newsletter



<https://oaap.org/>

503-226-1057 | 800-321-6227

- Short-term individual counseling
- Support groups and workshops
- Referrals to community resources
- *ThrivingToday* Blog
- *InSight* Newsletter

# PLF Books



Download at [www.osbplf.org](http://www.osbplf.org) > Services > CLEs & Resources > PLF Books or call (503) 639-6911 to order paperback set



## Materials

Program materials are available at [www.osbplf.org](http://www.osbplf.org) > Services > CLEs & Resources > CLEs

A photograph showing the words "THANK YOU" spelled out using light-colored wooden blocks. The blocks are arranged on a horizontal wooden plank. The background is a soft-focus green and yellow, suggesting an outdoor setting. The image is framed by a dark border.

THANK YOU

A horizontal line of white, torn paper separating the top image from the text below.

Questions?



- I. Building Reliable Office Infrastructure
  1. Practice Aid: [Office Systems Review Checklist](#)
    - i) Click on the Services tab > CLEs & Resources > Practice Aids > Office Systems and Procedures > Office Systems Review Checklist
  2. CLE: [Excellence, Perfectionism, and Well-Being](#)
    - i) Click on the Services tab > CLEs & Resources > CLEs > Excellence, Perfectionism, and Well-Being
  3. Blog: [Plugging the “Knowledge Drain”: How to Retain Knowledge to Ensure Your Firm’s Continued Success](#) (September 13, 2022)
    - i) Click on the Services tab > CLEs & Resources > Blog > Plugging the “Knowledge Drain”: How to Retain Knowledge to Ensure Your Firm’s Continued Success
  4. Blog: [Building a Good Workplace Culture in 2021](#) (January 15, 2021)
    - i) Click on the Services tab > CLEs & Resources > Blog > Building a Good Workplace Culture in 2021
  5. Blog: [Procrastination: A Story and Some Resources for Solutions](#) (February 5, 2021)
    - i) Click on the Services tab > CLEs & Resources > Blog > Procrastination: A Story and Some Resources for Solutions
  6. CLE: [Practice Management Software: Know What You Want Before Making the Switch](#)
    - i) Click on the Services tab > CLEs & Resources > CLEs > Practice Management Software: Know What You Want Before Making the Switch
  7. Practice Aid: [Checklist for New Staff](#)
    - i) Click on Services tab > CLEs & Resources > Practice Aids > Staff > Checklist for New Staff
- II. Improving Client Communication
  1. Practice Aid: [Client Relations Best Practices](#)
    - i) Click on the Services tab > CLEs & Resources > Practice Aids > Client Relations > Client Relations Best Practices
  2. Practice Aid: [Using Email in the Office](#)
    - i) Click on the Services tab > CLEs & Resources > Practice Aids > Client Relations > Using Email in the Office
  3. Practice Aid: [Using Voicemail in the Office](#)
    - i) Click on the Services tab > CLEs & Resources > Practice Aids > Client Relations > Using Voicemail in the Office
  4. Practice Aid: [Checklist for Drafting Engagement Letters](#)

- i) Click on the Services tab > CLEs & Resources > Practice Aids > Engagement Letters and Fee Agreements > Checklist for Drafting Engagement Letters
- 5. Practice Aid: Engagement Letters and Fee Agreements
  - i) Click on the Services tab > CLEs & Resources > Practice Aids > Engagement Letters and Fee Agreements > Engagement Letters and Fee Agreements
- III. Navigating Calendaring Time Bombs
  - 1. Practice Aid: [Docketing and Calendaring Checklist](#)
    - i) Click on the Services tab > CLEs & Resources > Practice Aids > Office Systems and Procedures > Docketing and Calendaring Checklist
  - 2. Practice Aid: [Reminder and Tickler Systems](#)
    - i) Click on the Services tab > CLEs & Resources > Practice Aids > Office Systems and Procedures > Reminder and Tickler Systems
  - 3. CLE: [What You Water Will Grow: Nurturing Your Productivity Habits](#)
    - i) Click on the Services tab > CLEs & Resources > CLEs > What You Water Will Grow: Nurturing Your Productivity Habits
  - 4. Blog: [Apps to Help Legal Professionals Stay Organized](#) (October 30, 2023)
    - i) Click on the Services tab > CLEs & Resources > Blogs > Apps to Help Legal Professionals Stay Organized
  - 5. CLE: [Avoiding Malpractice Claims When Filing and Serving a Complaint](#)
    - i) Click on the Services tab > CLEs & Resources > CLEs > Avoiding Malpractice Claims When Filing and Serving a Complaint
- IV. Drafting Error-Free Documents
  - 1. CLE: [Staff Supervision While Working Remotely: Practical Tips and Resources](#)
    - i) Click on the Services tab > CLEs & Resources > CLEs > Staff Supervision While Working Remotely: Practical Tips and Resources
  - 2. CLE: [Document Automation- Don't Be Afraid of the Robots](#)
    - i) Click on the Services tab > CLEs & Resources > CLEs > Document Automation- Don't Be Afraid of the Robots
- V. Improving Your File Management
  - 1. Practice Aid: [How to Back Up Your Computer](#)
    - i) Click on the Services tab > CLEs & Resources > Practice Aids > Using Technology > How to Back Up Your Computer
  - 2. Practice Aid: [File Retention and Destruction Guidelines](#)
    - i) Click on the Services tab > CLEs & Resources > Practice Aids > Office Systems and Procedures > File Retention and Destruction Guidelines
  - 3. Practice Aid: [What To Do After a Data Breach](#)
    - i) Click on the Services tab > CLEs & Resources > Practice Aids > Cybersecurity and Data Breach
- VI. Understanding and Effectively Utilizing Artificial Intelligence
  - 1. inBrief: [Exploring ChatGPT's Capabilities, Limits, and Risks for Lawyers \(Part 1\)](#)

- i) Click on the Services tab > CLEs & Resources > inBrief
- 2. inBrief: [Exploring ChatGPT's Capabilities, Limits, and Risks for Lawyers \(Part 2\)](#)
- 3. Blog: [Artificial Intelligence: Entering a "New" World](#) (November 13, 2023)
  - i) Click on the Services tab > CLEs & Resources > Blog > Artificial Intelligence: Entering a "New" World