

MSBA CLE Program Materials



Legal Technology and Law Practice Management Institute Featuring Barron Henley & Paul Unger

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Topics include:

- 1. Microsoft Word Power Tips: Getting It Under Control (1.5 credits)
- 2. Time, Task & Email Management (1.5 credits)
- 3. Mastering Outlook and Email Management (1.5 credits)
- 4. Fight the Paper: Achieve an Organized Paperless System (1.5 credits)
- 5. Introduction to Microsoft Excel (1.0 credits)
- 6. Staying Paperless with Tablets/Mobile Devices (1.0 credit)
- 7. A Legal User's Guide to PDF Files (1.0 credit)
- 8. Evaluate & Map Your Processes to Maximize Efficiency (1.0 credit)
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COURSE DESCRIPTIONS

1. MICROSOFT WORD POWER TIPS: GETTING IT UNDER CONTROL (1.5 CREDITS)

Most legal users find Microsoft Word to be a constant source of frustration. It's the primary tool we use to produce our work, yet it so often seems to be working against us. Unfortunately, simply using Word doesn't teach one anything useful about how to handle the complex formatting that legal documents often require. This seminar will show you how to fix Word's default settings for a law office, and how to solve the formatting issues every user struggles with, including automatic paragraph numbering, auto-updating cross-references, eliminating common paragraph formatting problems, and complex page numbering (turning it on and off, switching formats and starting over in the middle of a document). It's time to end your abusive relationship with Microsoft Word. We'll show you how.

2. GET ORGANIZED AND CONTROL OF YOUR DAY...AND PRACTICE! TIME, TASK & EMAIL MANAGEMENT (1.5 CREDITS)

Today's lawyers are constantly distracted by information overload from email, instant messaging, social media and phone calls. These distractions can cause very bright people to under perform. Time management seminars simply ignore the advantages and evils of technology. In this session, you will learn how to take back control and own your technology instead of it owning you. Learn distraction management techniques and practical time, task and email management methodologies that will help you regain control of your day.

3. MASTERING OUTLOOK AND EMAIL MANAGEMENT TECHNIQUES FOR LEGAL PROFESSIONALS (1.5 CREDITS)

Lawyers and staff are generally drowning in email and many feel helpless when trying to get it under control. This seminar addresses the important issues of avoiding email interruptions, efficiently storing email and attachments, dealing with high volumes of legitimate email, SPAM dodging, and a topic of growing importance—email encryption and security. We'll cover Microsoft Outlook's features that can help with all of the foregoing; you'll get our recommended default setting changes for email, calendar, contacts and tasks; and you'll learn many amazing and useful Outlook features most users don't even know exist.

4. GET ORGANIZED AND CONTROL OF YOUR DAY... AND PRACTICE! FIGHT THE PAPER: HOW TO ACHIEVE AN ORGANIZED PAPERLESS SYSTEM (1.5 CREDITS)

Is your desk covered in paper? Do you have trouble finding that similar contract you drafted last year? Most lawyers feel they are swamped with paper, and the more paper lawyers retain, the harder it is for them to find what they're looking for. This session will show you ways to reduce paper in your office and master your office technology so you waste less time, eliminate stress and get more done!

5. INTRODUCTION TO MICROSOFT EXCEL (1.0 CREDITS)

If you have Microsoft Office, then you have Excel. However, if you are like most lawyers, you're either underutilizing Excel or not using it at all. In this seminar, we start with the basics and work our way up. You'll learn powerful ways that Excel can improve your work product and make your life easier. Produce flawless fiduciary accountings, amortization schedules, real estate closing statements, disbursement schedules, medical bill summaries, and graphical representations of data (pie charts, bar graphs, etc.). You'll also learn how to use Excel as a list manager, a data source for mail merge functions, and the fundamentals of using formulas.

6. STAYING PAPERLESS WITH TABLETS/MOBILE DEVICES (1.0 CREDIT)

Whether you use a PC or a Mac, have an iPad or other tablet, this seminar will show you how an iPad can be used to nearly eliminate the need to maintain a paper file. We will help you make the tablet an essential part of your daily law practice workflow. Learn the apps and process to catapult your paper-based practice into a paper-free world.

7. A LEGAL USER'S GUIDE TO PDF FILES (1.0 CREDIT)

You have probably noticed that PDF files are everywhere. They have become the file format of choice when trading documents with other lawyers and clients. Many courts now require that all pleadings be filed as PDFs, and most government forms are available exclusively in PDF format. Because of their prevalence, everyone in your office needs to understand the risks and benefits of PDF files. In this seminar you'll learn appropriate uses of PDFs, and we'll cover extremely important topics such as metadata removal and electronic document security, redaction, Bates numbering, splitting/combining PDFs, reducing file-size for electronic case filing, review/comment and PDF collaboration, adding signatures & stamps, routing PDFs for comments/feedback, and more. Finally, we'll identify the programs you can use for all of these functions (you are not limited to Adobe Acrobat) and explain their relative pros and cons.

8. ARE YOU DOING IT WRONG? HOW TO EVALUATE & MAP YOUR PROCESSES TO MAXIMIZE EFFICIENCY (1.0 CREDIT)

Do you ever stop to think about *why* people follow the procedures that they perform on a daily or weekly basis? When we are part of the "rat race," we often don't stop to ask why ... or if there is a better way. "We've always done it that way" is often the answer, and that reason is many times outdated or no longer relevant. In this session, we will help you identify some common processes that legal professionals could revamp, and then use a very low-cost tool to map out an existing process. Finally, we will re-map it to make it more efficient.

9. DIGITAL SECURITY MEASURES EVERY LAWYER MUST TAKE (1.0 ETHICS CREDIT)

A lawyer must make reasonable efforts to prevent the disclosure of confidential client information. Although Maine has not adopted the ABA rule changes that directly address technology, there has emerged over the last 4 years a clear set of best practices when it comes to protecting electronic client data. The good news is that you don't have to be a security expert or techie to protect yourself and your office. Learn how to cover all the bases of computer, smartphone, tablet, email, wireless and document encryption. We'll also explain dual factor authentication and why you should be using it, proper password policies for a law office, and what you should be telling your clients about these issues. Half of the battle is simply knowing what questions to ask, and it's not nearly as complicated as it sounds. Establish best practices in your office and discover the inexpensive or free tools that will make sure your confidential information remains confidential.