

OSB Professional Liability Fund presents

Unlocking Success: Strategies to Elevate Your Practice

Thursday, March 7th, 2024
9:00 am – 10:30 am

MCLE ID 107532
1.5 Practical Skills Credits

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

Kalia Walker
Practice Management Attorney
OSB Professional Liability Fund



Professional
Liability Fund

CLE Materials

- PowerPoint Slides
- Additional Resources

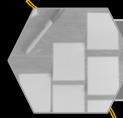
Unlocking Success: Strategies to Elevate Your Practice



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

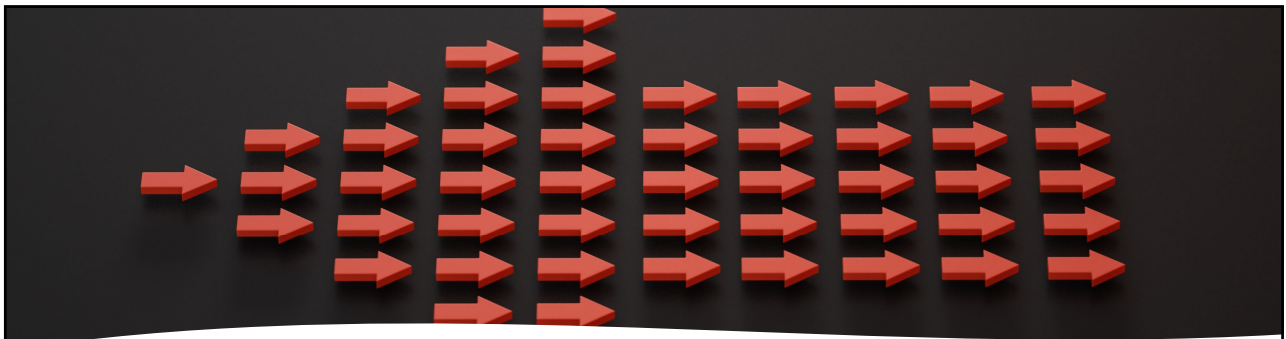


Utilizing AI



“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

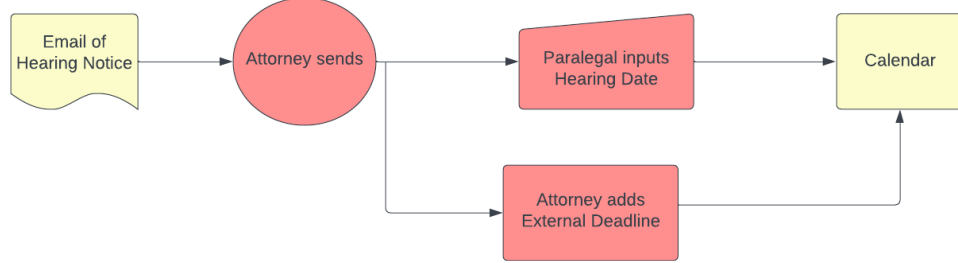


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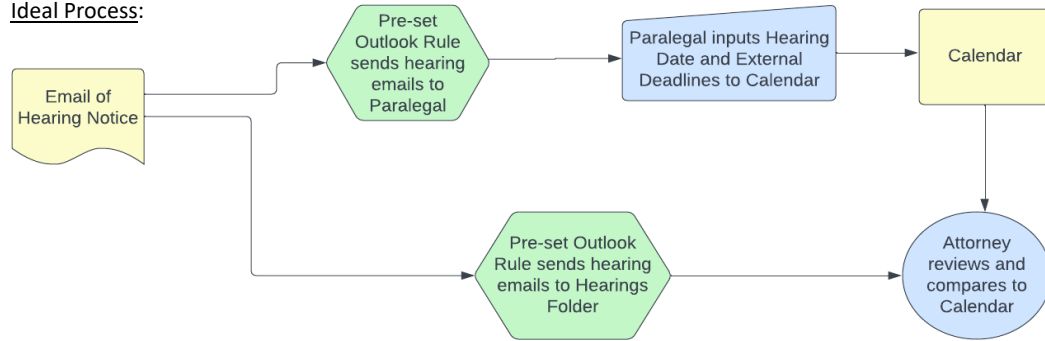


Process Map Example

Current Process:



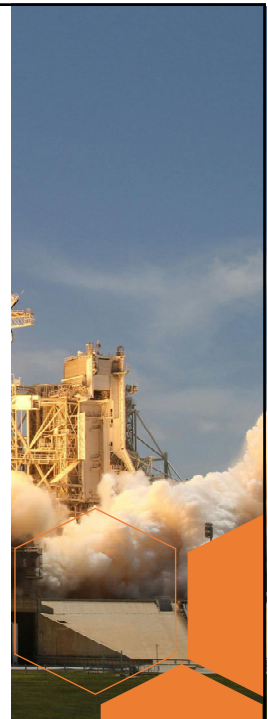
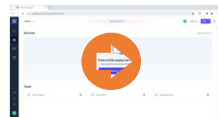
Ideal Process:



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



Foster Staff Excellence

- Create a checklist for consistent onboarding of new staff
- Know your management and leadership style
- Identify one area of improvement and provide coaching and resources
- Delegate clearly and with a growth mindset
- Appoint staff member to coordinate social or wellness events



Conquer Internal Communications

- Inspire team collaboration
- Identify policies for different types of conversation spaces
- Encourage coordination of staff meetings or events



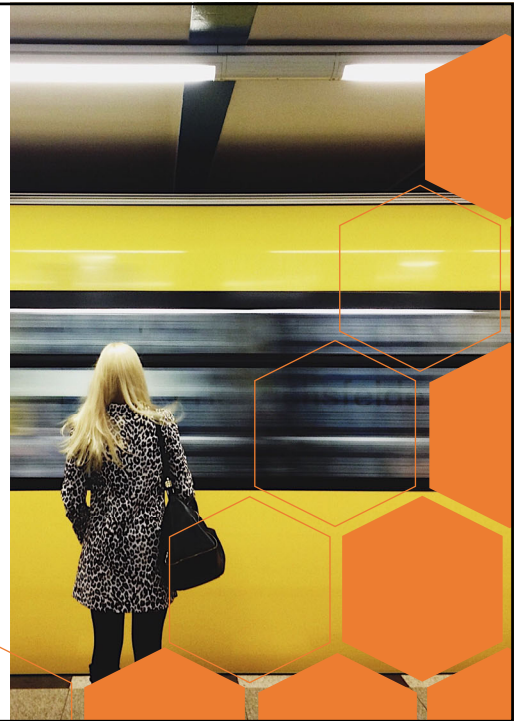
MS Teams



Google Chat

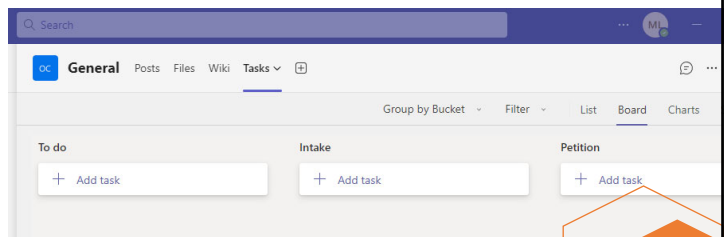
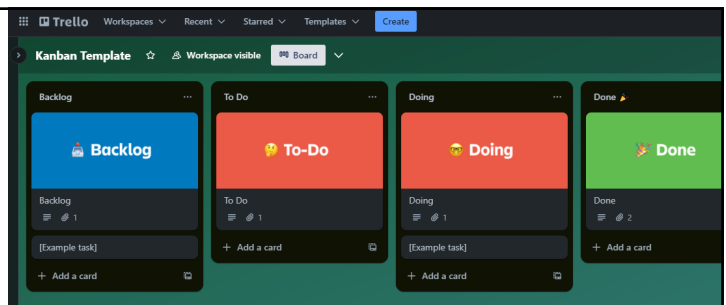
Help Amidst Procrastination

- Create “Motivation Injections” like Free Lunch Fridays
- Remind staff of mental health employee benefits
- Make your space your own
- Post your work hours



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







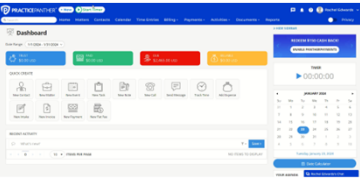






















| Cloud-Based Practice Management Software | | Pricing | Client Relationship Management | Client Mobile App | Text Messaging | Client Portal | Online Payments | Event Reminders |
|---|---------------|---------------------------|--------------------------------|-------------------|----------------|---------------|-----------------|-----------------|
|  | \$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 | ✓ | | ✓ | ✓ | ✓ | ✓ | |





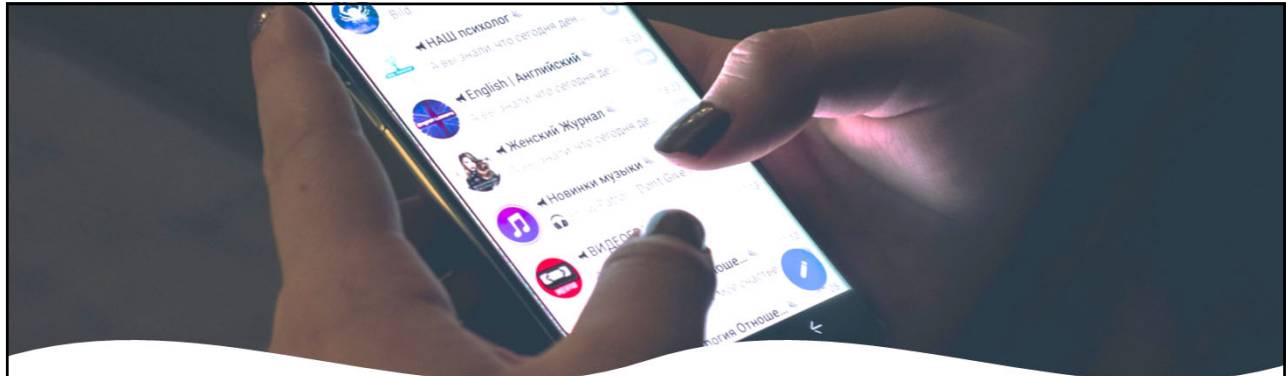
Communication Challenges

- 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

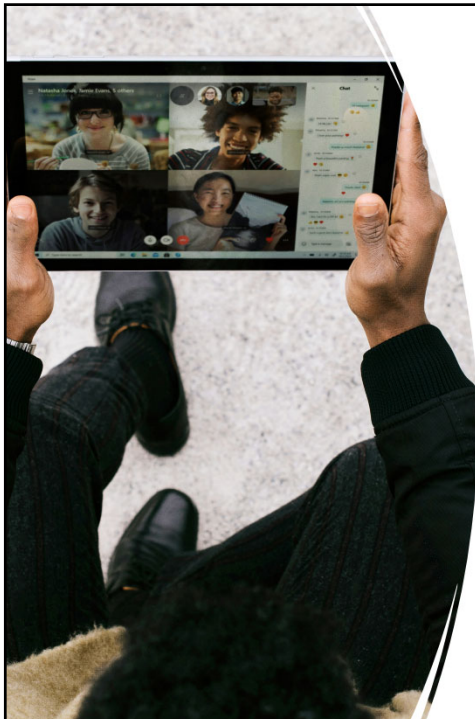
- Let them share their story
- Show empathy
- Communicate clearly by avoiding legal jargon
- Respect each other’s time





Choose Ideal Communication Methods

- 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



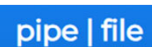
Texting

- 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

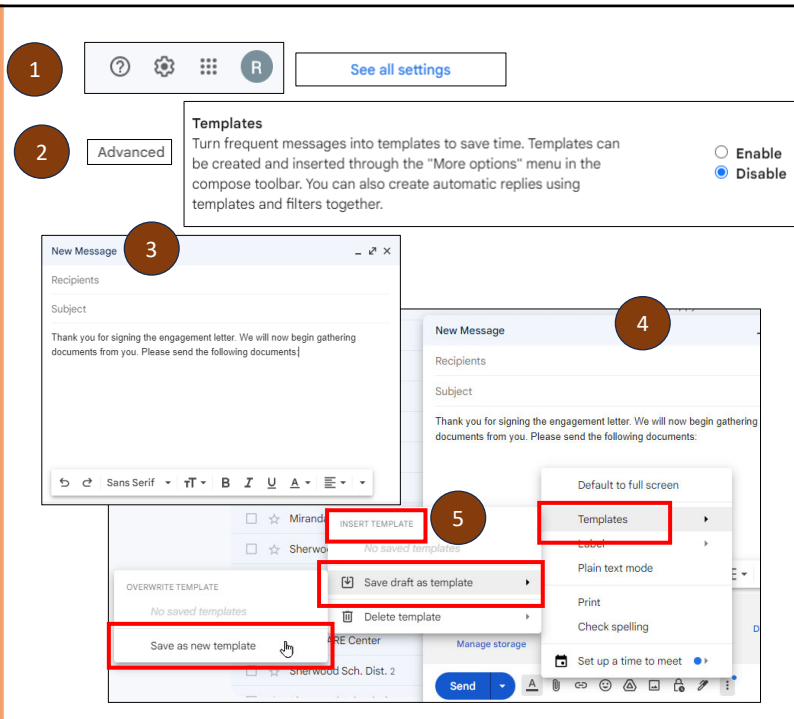
1. Click on Trigger.
2. Choose the app that creates the trigger. You'll be asked to sign into your app account if you haven't connected to it before.
3. Then customize your trigger event to trigger the next action.
4. Click on Action. You'll again pick an app.
5. Then select the action you want your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

The screenshot shows the Zapier interface with the following elements:

- 1. Trigger:** A box labeled "1. Trigger" with a lightning bolt icon and the text "An event that starts your Zap". Below it, a dropdown menu shows "1. Microsoft Office 365" selected. A search bar "Choose an event" is visible. A list of events includes "Calendar Event Start", "New Calendar Event", "New Contact" (highlighted with a red box), "New Email", and "Updated Calendar Event".
- 2. Action:** A box labeled "2. Action" with a lightning bolt icon and the text "An event a Zap performs after it starts". Below it, a dropdown menu shows "2. Microsoft Outlook" selected. A list of actions includes "Create Draft Email" (highlighted with a red box), "Create Event", "Delete Event", and "Send Email".
- Change trigger:** A dark overlay box with the text "Change trigger" and "A trigger is an event that starts your Zap". It shows a search bar and a list of apps including "Microsoft Office 365", "Microsoft Outlook", "Facebook Lead Ads", "Google Calendar", "Google Drive", "Gmail", "Google Sheets", "HubSpot", "Mailchimp", and "Stack".

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.





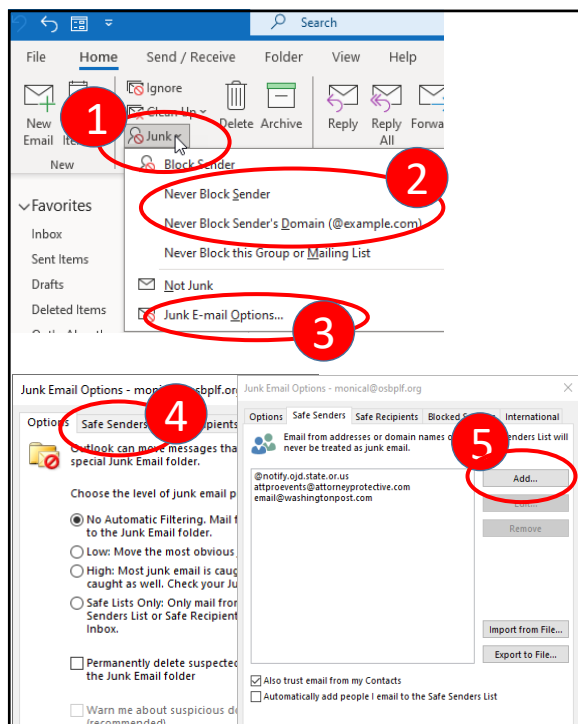
Missed Deadline Factors

- 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:



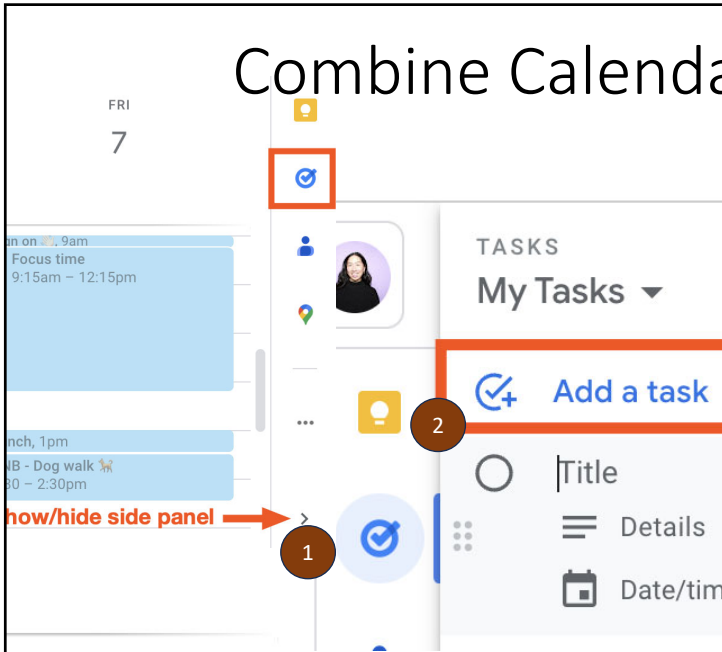
CARET





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

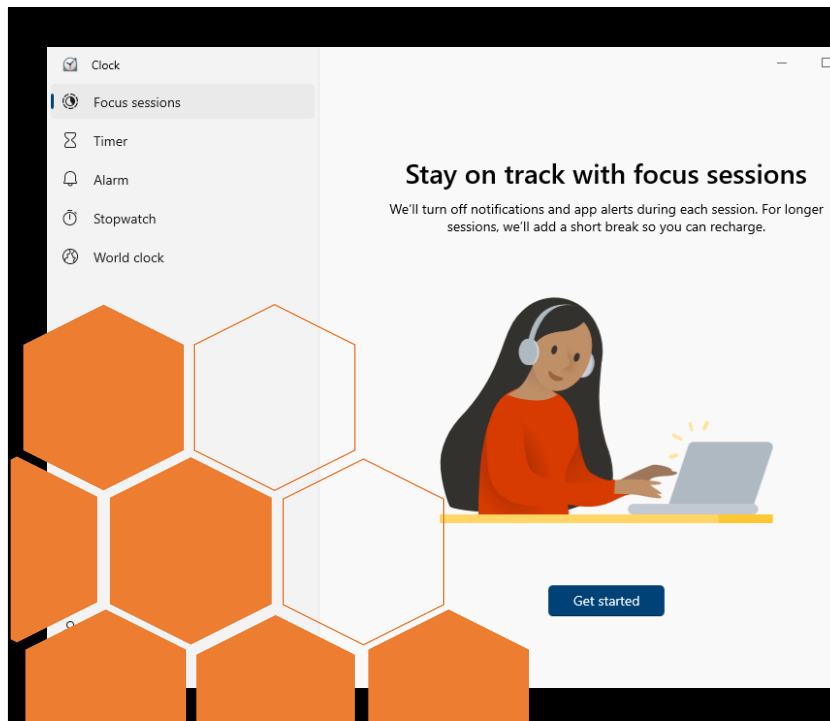
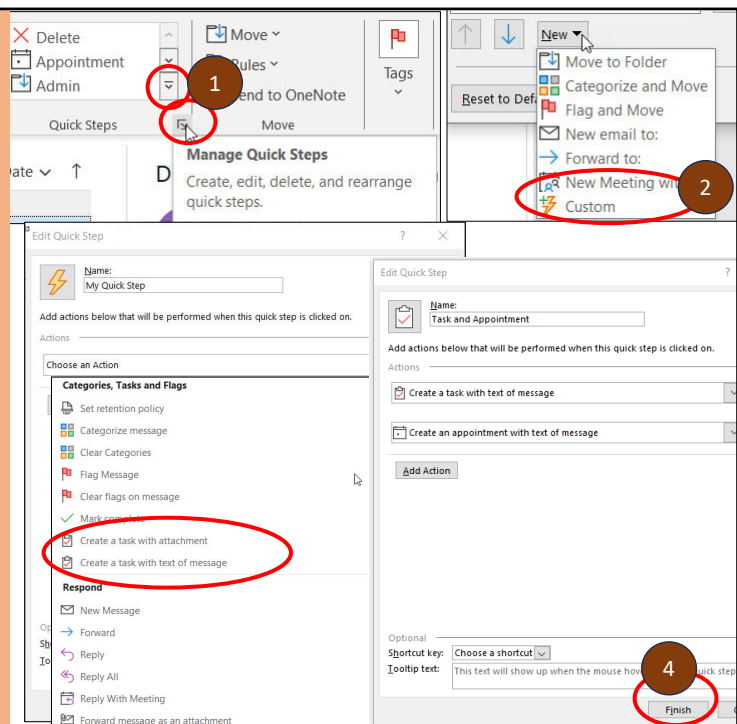
1. Find the right-hand side menu in your Calendar. Click the small arrow at the bottom to open side panel.
2. Find and click on the circled checkmark icon on. Here you will be able to see all your tasks as well as add a task.
3. Any new tasks with a date due will automatically appear.
4. In your email, 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

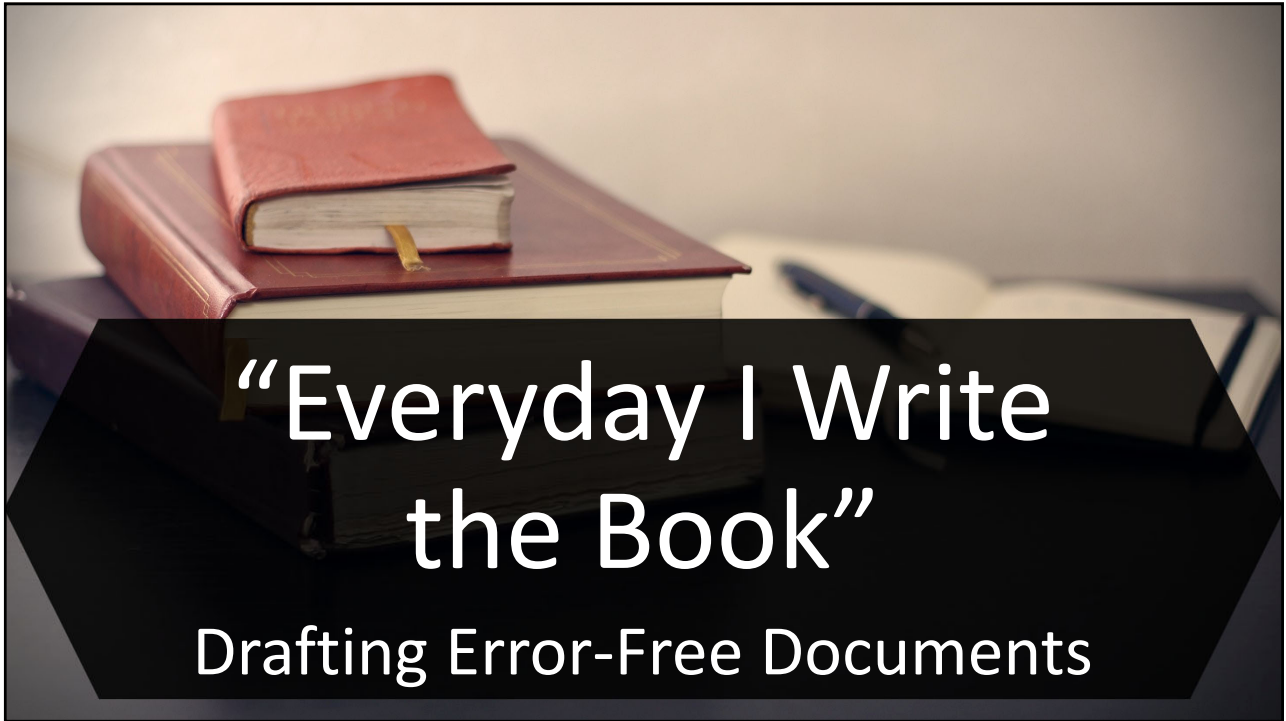


1. Click the arrow at the bottom right or the expand arrow to find Manage Quick Steps.
2. On the new menu, click New at the bottom left. Pick a preset option, or you can click Custom to see all the available actions.
3. If you click Custom, an Edit Quick Step menu will appear. Click the drop-down arrow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



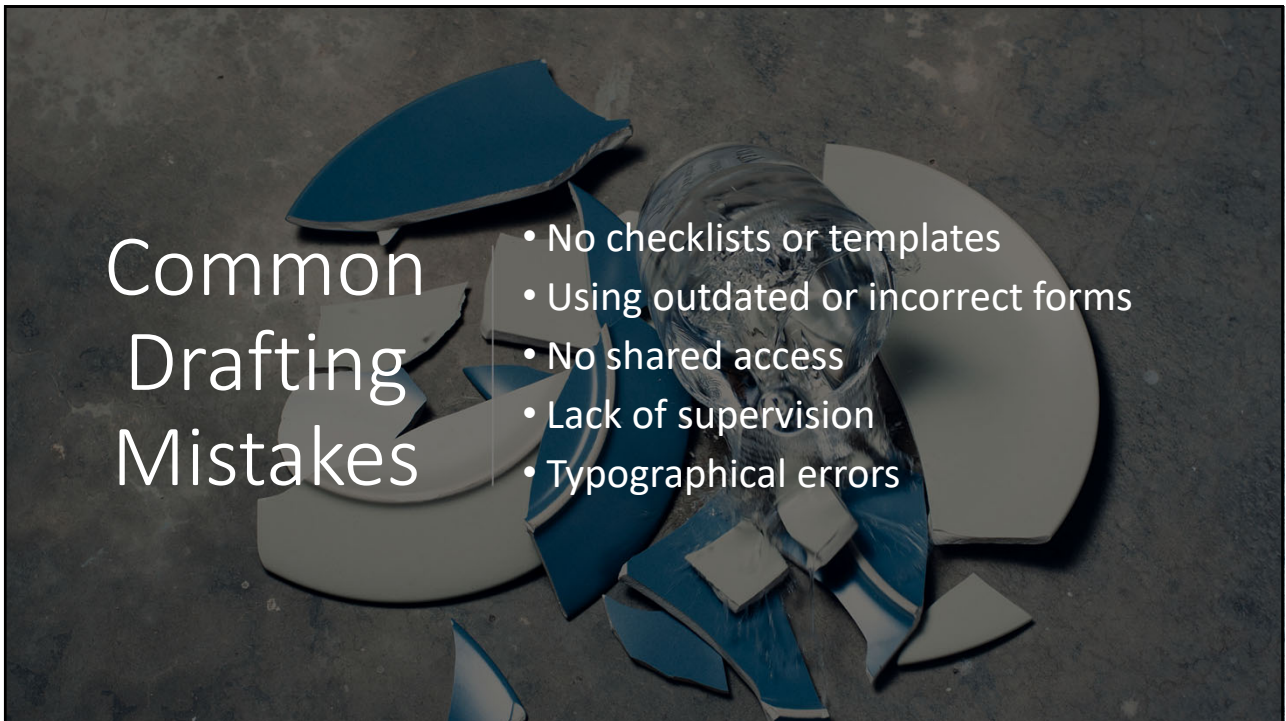
Time to be Found

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



“Everyday I Write the Book”

Drafting Error-Free Documents

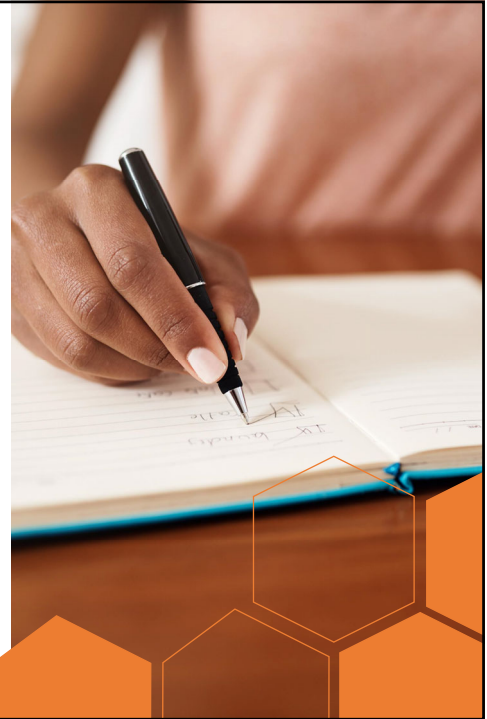


Common Drafting Mistakes

- No checklists or templates
- Using outdated or incorrect forms
- No shared access
- Lack of supervision
- Typographical errors

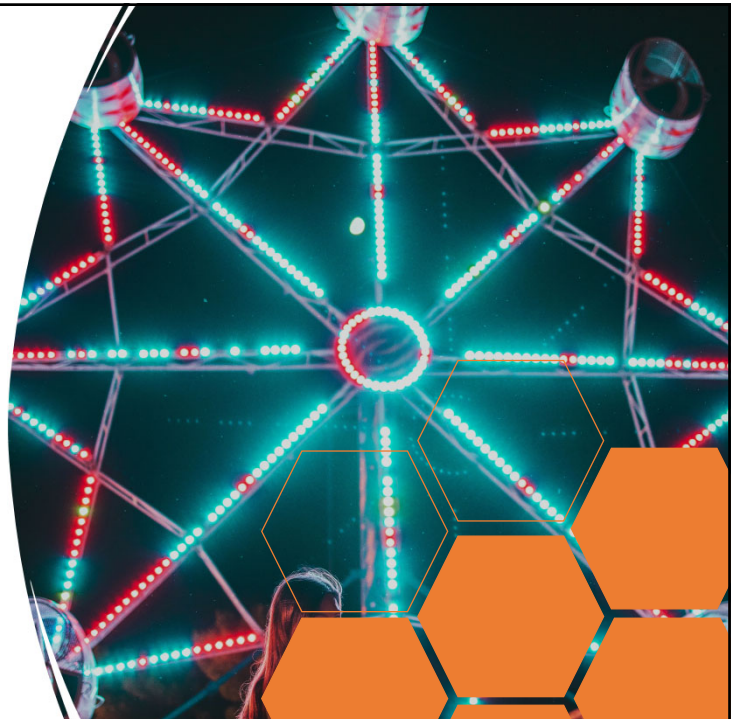
Create Checklists & Templates

- 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





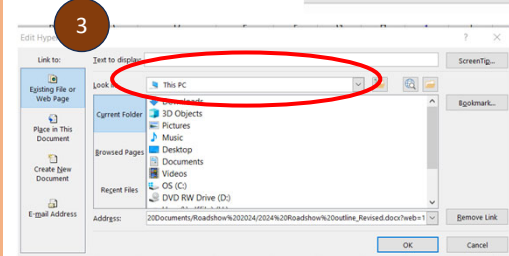
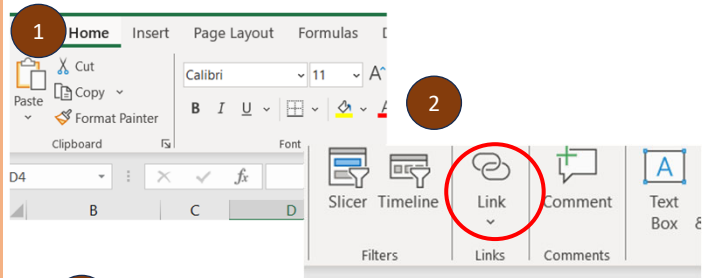
Update Form Documents

- 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.



Discovery Index - RFP #1

| 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

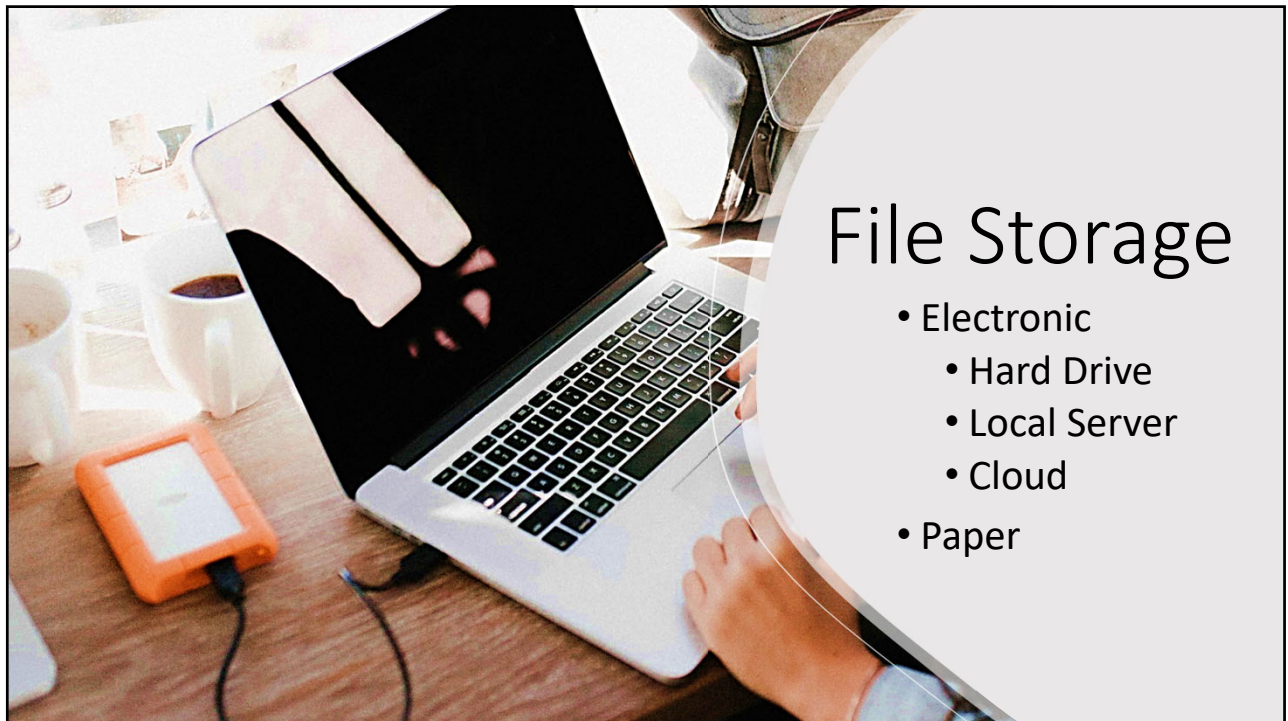


Common Challenges

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

Assess File Management Needs

- Conduct needs assessment
- Paper vs. electronic file retention
- Document management system (NetDocs, iManage) vs. storage (DropBox, Box)



File Storage

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

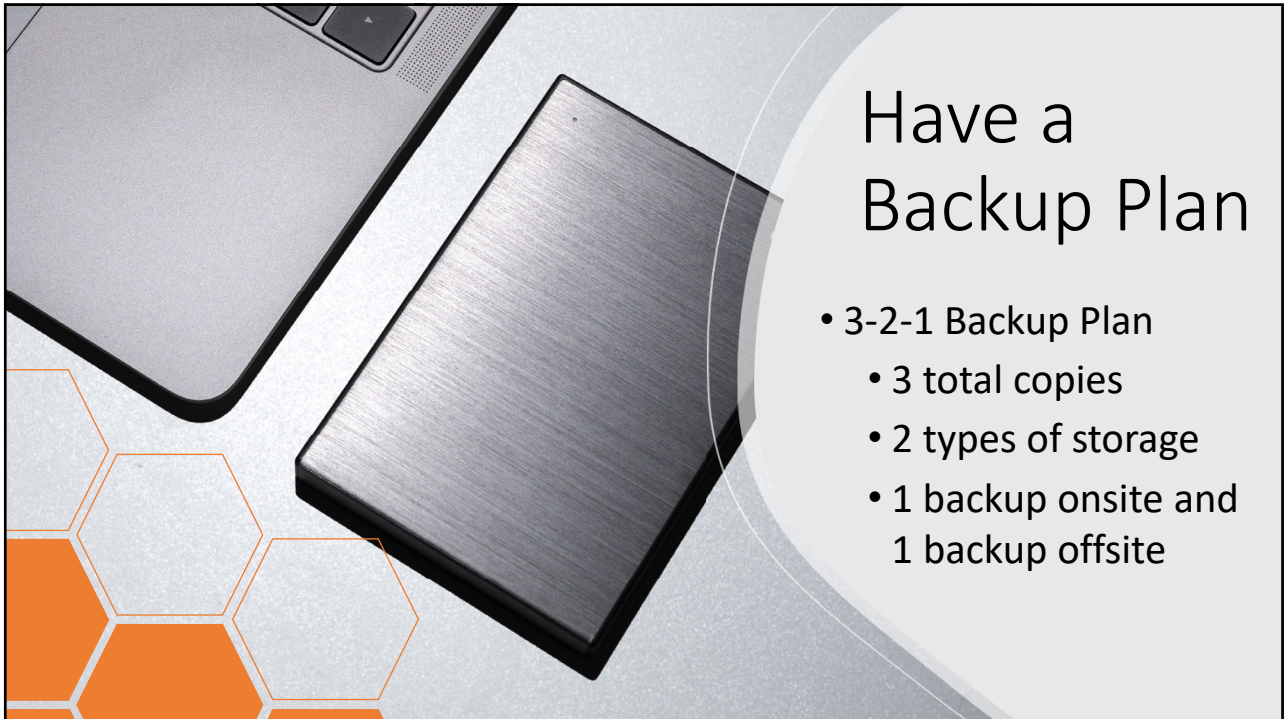
File Storage Tips

- Avoid 'paper-only' files or documents
- Purchase secure, fireproof & waterproof filing cabinets
- 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
- 3rd 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)

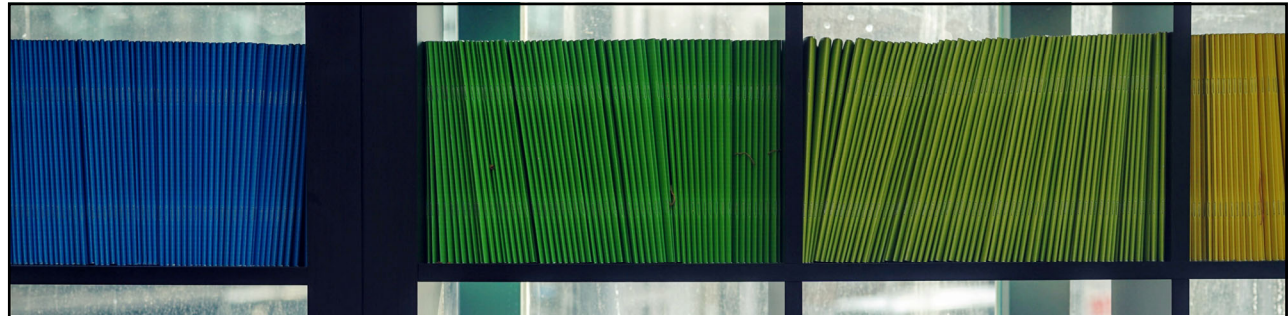
Cloud

- 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>



“Mr. Roboto”

Understanding and Effectively Utilizing Artificial Intelligence

Why does AI matter?

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

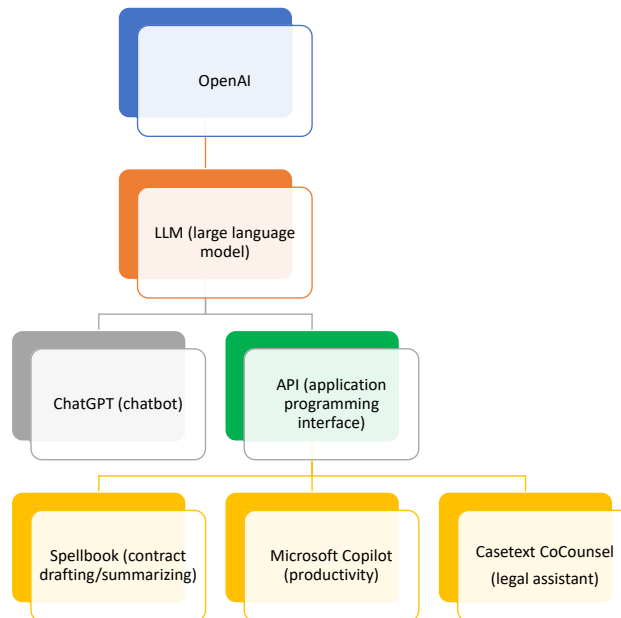




What is generative AI?

- 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?

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

What can
go
wrong?

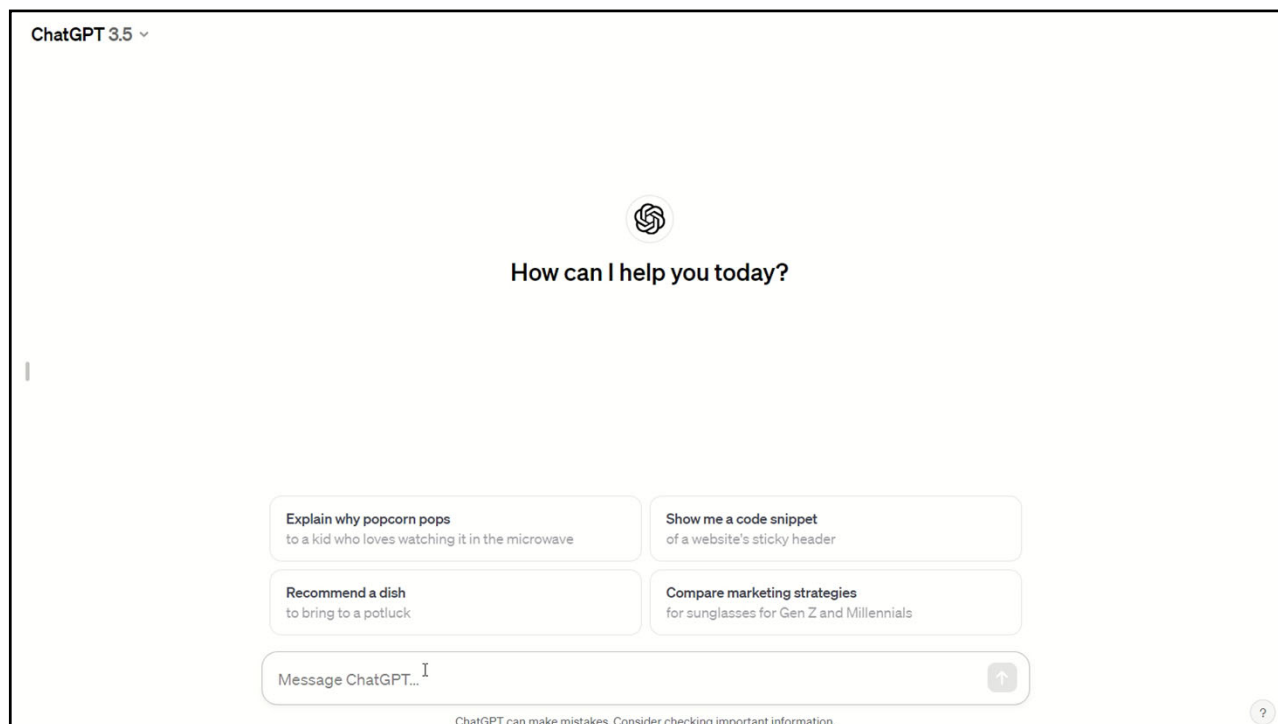
Unsure of sources

Difficulty handling unclear prompts

Hallucinations

Privacy concerns

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 > Services > CLEs & Resources > PLF Books or call (503) 639-6911 to order paperback set



Materials

Program materials are available at www.osbplf.org > Services > CLEs & Resources > CLEs

THANK YOU

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