



THE NEW SOLO

Rose-Ellen Fairgrieve

There was a time when I was way ahead of the technology game. My dad was an early adopter of the TRS-80 desktop microcomputer launched in the late 1970s and sold by Tandy Corporation through its Radio Shack stores. He used it to manage the database for the summer school he ran and I helped him enter the data. I came to know the students whose last names started with A through D really well, since we kept losing all of our data when we started out. I learned my way around the TRS-80 pretty well. In seventh grade, I typed a school paper on it and got an A+ just because my teacher was so blown away by the fact that it was right justified and contained no typos. I even did some programming in college.

Then something happened on the way to practicing law. In law school, I received the “ten hours of free Internet” CD in the mail from AOL, and had no idea what I might need ten hours of the Internet for. Let’s just say I haven’t come very far since then.

But starting my own firm forced me to get back up to speed. I've become obsessed with podcasts that dispense law practice management advice and recommendations for nifty apps. I get particularly excited about podcasts that have great tips that can save me five minutes here or there.

Enter Adriana Linares.

Linares hosts a monthly podcast called “New Solo” on the Legal Talk Network. She gives advice and encouragement to attorneys who are going out on their own by interviewing attorneys who have “been there.” In her day job, she is the owner of Law Tech Partners, a company that provides legal technology consulting and training to law firms large and small. The Bar Association of San Francisco’s Solo and Small Firm Section was fortunate to have Linares as the keynote speaker at its first annual conference on February 9.

WHY EMBRACE TECHNOLOGY IN YOUR LAW PRACTICE?

Though Linares has been in the legal technology field for twenty years, she says her experience after Hurricane Katrina in 2005 drove home the importance of embracing technological solutions. She knew of countless attorneys who suffered professionally by losses sustained during Katrina. The solo and small firm attorneys whose practices survived the disaster were those who had embraced technology in a way that allowed them to recover their data quickly.

Another huge upside to embracing legal technology, Linares touts, is that it allows an attorney to start a law practice for very little money. In this way, a solo attorney can keep costs down while building up a client base. The availability of law practice management applications in the cloud enables attorneys to work from anywhere, meaning they don't have to have a full-time office to conduct all of their business. Many practice management programs fall into the range of about seventy dollars per month. Simple document storage options, such as OneDrive, Dropbox, or Google Drive, are available for much less (but don't use the free versions for your law practice!).

Additionally, by embracing technology, attorneys can put systems in place to help them avoid common ethics complaints. For example, conflicts of interest should be easily avoided with a searchable database that contains information about prior clients and cases. Administrative errors can also be avoided by taking advantage of document automation—programs that allow attorneys to begin new documents without copying and pasting from a document that contains another client's information. Even an old-school program like Microsoft Excel can help attorneys avoid math errors, and, according to Linares, should be used for any and all math required for casework (she must know we all became lawyers to avoid doing math).

WHAT SHOULD YOU EXPECT TECHNOLOGY TO DO?

As a legal tech consultant, Linares helps firms find programs that best fit their practice. Here are some key features she says are important to consider:

Linares recommends attorneys use a “matter-centric system.” Such a system will attach every part of an attorney's day to a client matter. This includes appointments on the calendar; documents the attorney works on; and time entries the attorney makes. These features have the obvious benefit of helping an attorney stay organized and bill clients efficiently. They also allow a firm to analyze how attorney time is being spent and other important metrics without having to search for the information.

Another feature that attorneys can use to operate more efficiently is automation. Linares says that everything predictable and repeatable should be automated. She recommends using a client intake form that can be completed online by the client or by the attorney while speaking with the client. Once completed, the information from the form can then be entered into the attorney's system. Building on that, when the attorney needs to create a letter to the client or a pleading, the program will take information from the appropriate fields and merge it into the document template. This can be accomplished using practice management systems like HotDocs or TheFormTool.



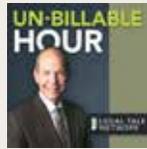
Adriana Linares (second from left) with guests, recording an episode of her podcast, New Solo, in BASF's member lounge during the February 9 Solo and Small Firm Conference.

PODCASTS & MORE

For more practice tips, check out the following podcasts and recordings, recommended by solo and small firm attorneys:

LEGAL TALK NETWORK

Visit legaltalknetwork.com to find the following podcasts and more: *New Solo*, hosted by Adriana Linares; *Lawyerist*, hosted by Sam Glover and Aaron Street; and the *Un-Billable Hour* podcast, hosted by Christopher T. Anderson.



LIFE OF THE LAW

Visit www.lifeofthelaw.org to listen to and subscribe to this award-winning PRX (Public Radio Exchange) production featuring investigative reports and discussions and live storytelling about "all things law."

TECH TUESDAYS



Log in to your BASF account at www.sfbar.org and access the Solo and Small Firm Resource Center, where you can find numerous recordings of Tech Tuesday webinars.

Vitaly important is maintaining the security of your information. Linares informed us that California has a public breach database. Under certain circumstances, attorneys have to report publicly when they have had a data breach. This could happen if the attorney loses a device, has a break-in at the office, or experiences a ransomware attack. However, attorneys can protect themselves by using encryption on their devices. That way, they may fall into the "safe harbor" provision under which they do not have to make a public report of the breach. Linares says there are many security vendors who specialize in the legal space. She recommends, at a minimum, that attorneys use encryption, which is standardly available in Windows (BitLocker) and Macs (FileVault). (Note, if you do have a data breach, you should not rely on this article to determine your reporting obligations!)

Further on the topic of security, Linares recommends communicating with clients through client portals. Many practice management programs have a way to communicate with a client through the program, thus avoiding email. (One guest on her podcast said you should not write anything to a client in email that you would not write on a postcard.) Within a client portal, you can send secure messages to your clients and send links that your client can use to upload documents directly and securely. You can also send draft documents back and forth that way.

TIPS AND TRICKS THAT CAN SAVE YOU TIME RIGHT NOW

Linares has some specific tools that you can easily implement to save time right away.

The easiest, quickest one, which even I could manage to implement within seconds, is managing the built-in auto-correction feature (also known as macros). I can't count how many times I've typed (c), only to have it turn into ©. Now, yes, you can hit the delete key to fix it, if you happen to notice it before you've typed beyond that. Otherwise you've got to go back and correct it. We're not talking saving hours here, but it is an annoying interruption. Also, you can use autocorrection to save time typing text that you frequently type, such as your name or phone number. For example,

I just added an autocorrection so that when I type REF, it corrects to Rose-Ellen Fairgrieve. What's more, I put this into Word, but it carries over into Outlook as well. If you really want to go crazy, you can go beyond what's built into your word processor and use an app such as Text-Expander for Mac or Breevy for Windows. These will give you the advantage of working across all your apps and are better for large blocks of text. Can you imagine dropping directions to your office into an email by typing "dir" instead of opening the file where you store the text and copying and pasting?

Another quick tip from Linares is to use the clipboard available in Word. The clipboard saves up to twenty-four pieces of text that you have copied, and you can select from them to paste into your text. The clipboard works across Microsoft Office applications, so you can copy text from Word and paste it into Outlook or Excel from the clipboard. This is especially great when you're working with different snippets of text that you want to select from, such as your top

three discovery objections.

Other basic efficiency-increasing tools Linares recommends are dictation software, or speech recognition (get to know Siri), and online calendar tools through which you can send a link to allow others to schedule time with you, such as Calendly or Doodle.

It's easy to find directions for any of these simple tips and tricks online. If I can figure them out, so can you.

There are many ways that technology can help keep your firm organized and efficient. If it's too overwhelming to figure out where to start, even a couple hours with a legal technology consultant could set you on the right path.

Rose-Ellen Fairgrieve owns Fairgrieve Law Office, which advises employers on labor and employment law matters, and defends employers in actions brought by employees. She is cochair of BASF's Solo and Small Firm Section.

SECTION MEMBERSHIP

A VITAL PART OF YOUR PRACTICE

As a BASF member, sections give you an excellent way to meet other members, share expertise, and improve the practice of law.

Section membership offers these invaluable benefits:

- ↳ Take a leadership position—build your professional brand
- ↳ Opportunities to deliver programs as a subject matter expert
- ↳ Continuous learning and skills advancement opportunities
- ↳ Access to over 200 in-person and 700 online MCLE programs
- ↳ Recorded seminars in digital formats for self-study credit

Want to add a section to your membership?



It's easy to sign up at

SECTIONS.SFBAR.ORG

