



# The Legal Connection

where legal technology & people connect

2012-12

## Wish I Do An Assessment

As the year draws to a close and I do my year end technology assessment – I am almost always surprised at what turned out to work and improve my and my company's efficiencies vs. what did not.

For instance, I never dreamed that Evernote could do for me what it does. I am securely connected to my digital scraps, pictures AND handwritten notes from literally anywhere – including my favorite twitter app, Hootsuite. I get my handwritten notes digital by taking a picture of each day's page and loading it to Evernote. The best for me is even though I am part Windows user / part Palm WebOS – doesn't matter - Evernote works on those and Android and iThing too. Definitely one tech I didn't see coming which brings much more value to the table than the \$50 a year it costs for a secure account.

One new tech in – one old tech out: a tech I have recommended for years no longer exists outside of a larger, much more expensive and expansive suite of tools. BackpackIt is now only available through Basecamp so is removed from my processes and recommended tech for lawyers. Less expensive options exist which have attorney-client security/privacy considered at the core.

The theme this month is wish – so if I had one wish for you, it would be stop running; take a step back; and really look at how you get business done. Determine where you have roadblocks by doing an assessment. It doesn't have to be hard – just write down everything you can think of that needs to get done; or be done better; or be done without you. Be honest. You can't be good at everything. It's OK. Just be good at lawyering and everything else can have systems and people put in place to keep you on top of what you need to be. Email me if you need help.

For LegalTypist, a lot is going on:

- just wrapped up another fabulous webinar with Carolyn Elefant on The 21<sup>st</sup> Century Retainer Agreement. (If you don't know Carolyn, make a point to visit her site: [www.myshingle.com](http://www.myshingle.com) and spend an hour or so clicking around.)
- I'm putting the finishing touches on the TLCxn Community Site.
- I am researching and ruminating on SaaS and communication technology/processes for two presentations at ABATechShow. I am also planning the annual LegalTypist SuperPasser/ Solosez meet up.
- All the while I continue to test/snuffle and advise on which of the techs offered to legal (a) do what they say they will; (b) are as secure as they can/should be; (c) have people running them who have a clue as to (a) and (b).

At this rate, I expect my personal schedule to get slow in the Summer – or just when I like it to!

Let me take a quick sec to thank 2012 contributors Katie Wilson; Allison Shields; Ben Schorr and welcome back Bruce M. Cameron, Esq. (The Rural Lawyer) and Barbara Nelson – lawyer coach extraordinaire to the 2013 crew. Joining Bruce and Barbara as 2013 contributors are attorney Justin Meyer who will discuss web based techs; and attorney Jeffrey Taylor who will discuss all things Droid. If you'd like to write for TLCxn or have a topic covered, email me at [editor@legaltypist.com](mailto:editor@legaltypist.com)

I wish you peace, joy and prosperity in 2013!



## 5 Popular Tweets

- Everyone's Trying to Track What You Do on the Web: Here's How to Stop Them @lifehacker <http://ow.ly/fUVy3>
- Why You Can Never Truly Delete Your Email @mashable <http://ow.ly/g4iED> HT @glambert
- Here's What the New Facebook Privacy Settings Will Look Like @mashable <http://ow.ly/g4cKo>
- I just learned Google Apps will all be paid version (no more freebies) <http://ow.ly/fUwRp>
- Most Popular How-To Guides of 2012 @lifehacker <http://ow.ly/fVTTV>



### April 4-6, 2013 Chicago Hilton

Meet LegalTypist CEO Andrea Cannavina who is speaking at ABATechShow 2013. Just as in past years, LegalTypist is also putting together a SuperPass. Email [techshow@legaltypist.com](mailto:techshow@legaltypist.com) to get added to the group and get in to TechShow for \$500! <-+ you might want to buy Andrea a beer at TechShow!



# My Technology Wishes For You

Technology and wishes, my editor tells me. That's this month's theme. I don't think you need my help to come up with the list of technology you'd wish for- there are much better sources of recommendations than me for that list. Instead, here are six "technology" wishes that I have for you:

- 1 That you implement reliable, consistent backup processes that cover the scenario where your office blasts spontaneously into outer space, never to be seen again.
- 2 That you live up to your duty to provide competent representation, including the need for competence in selecting and using technology. Consulting with people who are technically qualified is a duty, not a choice, unless you are qualified yourself. (And if you are, really? Is that the best use of your time?)
- 3 That you update software applications appropriately.
- 4 That you leverage technology fully, looking proactively to find where technology can enable processes to make them more efficient and reliable. That you match the appropriate technology to the task.
- 5 That you mindfully choose how and when you will be accessible via technology.

Six wishes, may they all come true! Let's add one more: may you never curse technology, may it always be a blessing.

And with that thought, let's look forward to the last days of 2012 and on to 2013! Wishing you safe and very well indeed, all the best- Barbara



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**Barbara Nelson** is a disruptive influence. If you're in need of a dose of constructive disruption, check out:

<http://www.successfullysolo.com/>

Life is short. Business coaching works.



# I Wish I Had More Clients

I wish I had more clients. So having done some research, I have determined that all that I need to do is: maintain a blog - preferably a separate one for each practice area, be active on LinkedIn, post on Facebook, send out an e-mail newsletter (is this supposed to be different from the blog?) and tweet. I feel like that will take my whole day; when do I actually perform the legal work that all these new clients will need?

There are benefits to technology, but it's easy to go overboard with internet marketing. It's easy to let all of these activities take over all of your time and what you're left with is no time for an actual practice. That's dangerous; while marketing might get clients to your door initially, it's through service (and quality service at that) which not only keeps them coming back but also gets them to recommend others to you.

Which is not to say that internet marketing is bunk, hokum or even nonsense. A website is essential and by providing at least one place where potential clients can learn about you makes sense. Social media marketing is also a possible benefit.

To be clear, I'm no internet marketing guru; I'm not a guru of any kind, and I'm not necessarily the best marketer myself. But I'm not trying to sell marketing strategies - I'm offering what I hope is some common sense. LinkedIn, Facebook, e-mail newsletters, and blogs all offer you to show off your expertise and find your voice as a

lawyer and firm. However, because each medium takes time and offers it's own relative advantages and disadvantages, it makes sense to find the tool or tools that work best for you personally and devote the time required to optimize it and make it work.

Everyone out there will try to sell you on internet marketing. Everyone, and every organization, has classes on social media marketing, with varying quality. But it's not one size fits all; nothing that the marketing gurus suggest will work for everyone - you need to find what works for you and run with it. If your goal is to attract more clients like the ones that you have, then use your current client base as a focus group - ask them what they want to see and what they would respond to. This will give you an idea of where to start focusing your strategy.

In short: pick the appropriate medium for you and your target audience, learn it, and use it as best you can. The worst marketing mistake you can make is to not try.



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**Justin Meyer** is an associate with Meyer and Associates, in Hauppauge, New York. While he is not a marketing guru, he'll happily accept checks for \$295.95. For more information about him and his practice, go to <http://www.meyeresq.com>. He can be reached at [jmeyer@meyeresq.com](mailto:jmeyer@meyeresq.com)



In past years, millions of Americans watched fitness guru, Jilian Michaels and NASCAR star, Danica Patrick appear in provocative, and highly controversial, SuperBowl advertisements to promote GoDaddy, the largest domain registrar in the world. Over the past few years, registrars have increasingly turned to expensive television and radio advertising to promote domain registration and website hosting services. With a long list of domain service providers all vying for your business with attention-grabbing commercials and inexpensive hosting packages, it can be difficult to determine which registrar is best. Consider the following factors when selecting a domain host for your firm:

## Domain Manager

All registrars give you access to a domain management control panel so that you can make changes to your domain-related settings and very often manage email accounts associated with your domain. This control panel can vary greatly from registrar to registrar. Some let you have full access to all facets of your domain name (DNS settings, subdomain records, etc) while others simply allow you to make minor adjustments like a URL redirect. Take time to fully identify your domain administration needs before purchasing your domain name and be sure that you learn as much as you can about the domain manager. There are entire online forums dedicated to discussing functionality of each and you may even be able to get your hands on some screenshots of the control panel that you are considering. Look for domain managers that have helpful "how to" prompts throughout the control panel so you have additional support.

Along these same lines, it's imperative that you select a registrar with 24/7 phone support who can make changes for you (on those days that you just don't have the time to test your IT skills) or guide you through making the changes on your end. Many registrars, like Network Solutions, have support but generally insist that all changes that can be made through their control panel interface, be made by YOU, and they offer little guidance beyond step by step instructions which can be found on their site. Should you call them for help, you will likely find that they quickly refer you to their control panel and place the ball back in your court.

If a domain registrar does not have 24/7 phone support, avoid them at all costs. Sure, they all offer the option to submit support tickets but when it comes to your firm's website that just doesn't cut it. If a server goes down or you have a sudden change in the firm such as a termination of an employee, that requires a revision to the website or an email account, you can't wait 24 hours for your "ticket" to be answered.

## Email & External Hosting

When considering a domain registrar, you must also consider email hosting and how you intend to set up your firm's email accounts. Most registrars offer basic POP email accounts with a set storage limit (generally anywhere from 2- 5MB) for a minimal cost. A majority of registrars have also introduced proprietary exchange systems or offer Microsoft Exchange to their clients for a higher monthly fee. More and more firms, however, are choosing to host Exchange on site in their offices or through a local IT company. If that

is the case for your firm, you'll want to make certain that the domain registrar of your choice allows for external hosting; not all do.

## Hidden Pricing

You receive a promotion from a mega-registrar that domain names ending in .com are just \$3.99 for the first year so you snatch up all that are related to your firm including a domain with your name, your partners' names and the firm's initials. Down the road, you'll just forward them all to your firm's website. Ideally, you should be able to establish a URL redirect, also known as a permanent 301 redirect, right through the domain control panel but this isn't always the case. Service providers like Network Solutions charge an extra fee for a domain redirect and while it is only a few dollars, this can add up if you have multiple domain names. Other hidden fees include charging for "private registration" which allows you to keep your contact details out of the Whois domain database (and out of the hands of spammers) or even the ability to lock your domain so it can't be transferred without consent. With the "extras" tacked on, a yearlong domain contract can easily cost you more than \$30.00 per domain name.

## The Dreaded Domain Lock

When you first purchase a domain name, ICANN requires that a 60 day lock be placed on the account during which time it may not be transferred to another provider. However, some registrars can be rather tricky and when you make a change to basic contact information within the account (or even remove private registration), they "perceive" this as changing the registration information and reinstate that 60 day lock. This can be incredibly frustrating for a firm who may be gearing up to transfer a domain. If you plan to manage your firm's domain registration, take time to understand how changes you make in the domain control panel may impact your account. On the surface, selecting a domain registrar and managing your firm's domain name may seem relatively easy but that's rarely the case. Often firms don't realize just how complicated making changes can be until they need to update an administrative setting or change an email account and are unable to do so. To ensure that you are in complete control of your domain with experienced support behind you, take time to learn about all of the options on the market and engage members of the legal community who can share their experiences working with different registrars.



## The Rural Lawyer : Wish

*I know starting careers in troubled times is a challenge, but it is also a privilege. Because it's moments like these that force us to try harder, dig deeper and to discover gifts we never knew we had. To find the greatness that lies within each of us. So don't ever shy away from that endeavor. --*

**Barack Obama**

It's Black Friday and winter has rudely interrupted my turkey induced post-Thanksgiving coma, blowing all thoughts of participating in the day's joyous crass commercialism from my mind. Instead those cloud-laden winds blowing down from the chilled Canadian prairies have chased me into the warm confines of my office to face the day's few administrative tasks.

My technological companions will see no major new additions this year; the one downside to stability and reliability is that there is little desire (and no need) to move on to the current "next great thing" in hopes that this sultry bit of silicon will be the cure for all ailments. Oh, there may be a flash-drive in the laptop's holiday stocking, and the desktop system may finally get upgraded to the 8 Gb RAM she's been wishing for all year, but that is likely to be the sum total of the shopping list for Cyber Monday.

Much to my great disappointment, the various technological temptations that, like the swallows of Capistrano, come flocking my way this time of year, hold little interest having been replaced with plans for building a better practice (it appears that I may have finally picked up the mantle of adulthood). So, as I continue my entrepreneurial endeavor, here are my wishes for the new year.

I'd like to get smarter about social networking. Far too much of my time is spent thrashing about in the social media morass, leaving me feeling like I've spent 80% of my time simply shouting down a well. Oh, I've got the "rural lawyer as an individual professional" side of things down, it's my practice's presence that needs work. It's not a problem of theory, it's a problem of finding right the tools and the platform(s) so I can automate and off-load as much of the work as possible; I'd like to front load the actual content creation and automate the delivery - in other words: network smarter.

I'd like to perfect the art of saying "no." No is such a simple word and is a powerful time management tool that I am, much to my misfortune, not using to full advantage. Oh, it is such a simple matter to say "no" to that problematic client (even small town lawyers don't take every client), it is, however, far more difficult to say "no" to the various pro bono opportunities (legal clinics, community mediations, non-profit board membership, etc) that come down the pike. And therein lies the dilemma, how to balance making a living and community responsibility. My wish is not for the simple expedient of always saying "no", rather my wish is to be artful in the use of "no" so that I can achieve an ideal balance between profit and responsibility.

I'd like to see more new rural practitioners if for no other reason than it is far more fun to have others to play with. The reality is that over the next 10 years or so, it is estimated that 2/3's of the lawyers currently practicing in small towns are going to retire, and when that happens, they will leave behind two things - people without ready access to legal services and opportunity for those willing to practice outside of the metropolitan mainstream. I'd dearly love to see this need met, so I'm selfishly wishing for a few new playmates.

Finally, I'd like to see all of you reach your goals; to discover the gifts and joys that your practice - where ever it may be - brings to you.

Happy Holidays, the Rural Lawyer.



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**Bruce M. Cameron** Having decided that going to law school and opening a solo law practice would be a sufficient response to the male midlife crisis, Bruce now practices Collaborative Family Law and Estate Planning in rural Minnesota. When not in the law office, he can be found on his small farm where he and his wife are at the beck and call of a herd of horses, a couple of cats, a few dogs and one extremely spoiled parrot.  
<http://www.rurallawyer.com>

# Gain Loyal Clients by Anticipating Their Wishes

Every attorney wants loyal clients: the clients who give you glowing testimonials, the repeat clients, the clients who tell all their friends about you, and the clients that write reviews praising your firm on Yelp, Avvo, and via social media. These clients will also give you the benefit of the doubt if you make a mistake (as long as you do your best to make things right). Best of all, these happy clients will frequently pay more for your stellar attention to detail, responsiveness, and sincerity.

So how do you inspire these loyal clients? Get them to say, "Wow!" by anticipating their wishes! Listen for unexpressed needs and fulfill them without being asked. In fact, give them what they don't even know they want. Delighting your clients is one way to reach them on an emotional level – and they'll want to share their remarkable experiences with the rest of the world.

Look for unexpressed needs at every touch point and in every conversation. (A touch point is any interaction a client has with your firm that could make an impression.) For example, when potential clients visit your website, is it easy to find your phone number? After being referred by a friend or doing some initial research, new clients will often want to speak with their attorney live before hiring them. Listing your phone number on every page is one simple way to anticipate your clients' desire to call you.

When your clients call you, does your receptionist or virtual receptionist service continue to anticipate their needs? Add listening for verbal cues to their phone answering training. For example, if a client mentions they've called multiple times today, look up their phone number from an earlier

message, rather than asking for it again (*"Is the 212-555-7829 number still the best number on which to reach you?"*). In fact, you may also ask them if there's a good time to reach them, so that you can make sure the attorney is able to connect with them. If a client declines to leave a message, send an FYI notification anyway; they'll be impressed when they get an unexpected return call to check in!

As far as your office environment goes, does your receptionist reference your calendar so that he or she is able to greet each guest with an appointment by name? After a personal salutation, continue anticipating visitors' needs by offering them a beverage and a seat. We call this the "Greet, Seat, and Treat" method at the Ruby office, and it always generates goodwill with guests.

Once in your client meeting, make sure your conference room or office is stocked with notepads and pens in case someone forgets theirs. Keep a pitcher of water on-hand just in case a client who declines the "treat" part of their greeting, reconsiders later.

There are dozens of ways to anticipate your clients' wishes! Create checklists or pieces of training so that you can consistently fulfill their unexpressed needs with every interaction.

And remember, these touches of thoughtfulness will make a big impression on clients – one that will earn their loyalty and new business!



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**Katie Wilson** is a Sales and Marketing Associate at Ruby Receptionists. Harkening back to an era when every call to an office was answered by a friendly receptionist, Ruby Receptionists provides personalized live, virtual receptionist service to small businesses and professionals throughout North America. Visit: <http://www.callruby.com> to learn more.



# The Legal Connection

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## The Legal Connection Community Site

The Legal Connection offers those in the legal profession a place to mix, mingle, learn and share their knowledge, all in a friendly atmosphere.

From our newsletter, links and podcasts, to meet ups and webinars, if you are in "legal", use technology and want to connect with other professionals, The Legal Connection is the place for you!



**Join The Legal Connection Today!**

### Upcoming Events

[January Meet-n-Greet](#)  
08 Jan 2013 1:00 PM • On line

[Mobile Security](#)  
09 Jan 2013 12:30 PM • On line

[LegalTech NY 2013 - Group meet up](#)  
29 Jan 2013 5:00 PM • TBD



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