

5 ways to future proof your legal practice



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GET FAMILIAR WITH EXISTING TOOLS

OFFICE 365

If you already use Microsoft Office you have access to a lot of useful automation potential that you or your team might not know about. Before you buy any new software, look at whether there is under-utilised capacity in the software you already have.

Most of it is easy to set up - the hard part is working out where the software can help you.

These are some ideas to help your team work better together, more efficiently and without being tied to the office. Click on the red button for links to instructions on how to set it up.

COLLABORATION

Set up Outlook group calendar to book common meeting rooms, maintain a common annual leave calendar, share important court dates or settlements in a calendar that everyone in the team can access from anywhere.

Office 365 comes with Teams which enables group communication that is better than email. Instead of messages being siloed in individual in-boxes, everyone on a channel has access to conversations. Hate having your inbox flooded with group messages you don't need? Using Teams removes the inefficient disruption of email. Instead people to follow the channels relevant to the work they need to do. If someone joins the team, they can have access to all of the existing communications in a channel.

How to
set up a
group
calendar

More about
Teams

WORK PAPERLESS

If you or your team want to be able to work effectively while out of the office you need to invest in setting up a good system for note taking and marking up documents. OneNote has some handy functions so you can convert handwritten notes into text. Or take photos and save them into your notes of a conference.

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AUTOMATION

Use Quicksteps to save frequently used phrases or blocks of text in Outlook and Word. Even if you haven't got time or resources to upgrade and roll out a new precedent system you can easily create and name standard blocks of text.

Some examples include:

- standard phrases used in an affidavit to describe an annexure or exhibit
- instructions on how to sign and return a document you are sending out for execution
- directions on the best place to find a park when visiting your office

You insert the saved text by typing the first couple of letters of the name of the saved block of text and press F3. You don't need to ever write the same email again.

Click to
see how to
save a
Quickstep

PROJECT MANAGEMENT

Tools like Trello are popular for visual task management. Office 365 comes with its own integrated project management tool called Planner so you can set up a Kanban board to help your team members allocate workload and manage critical deadlines without paying extra for another product.

What is a
Kanban?

BETTER MEETINGS

Using OneNote for meetings allows you to save attachments such as agenda and presentations as a record of the discussion. You can take notes during the meeting and share your notes with the other attendees at the click of a button, either in real time (for collaboration) or after the meeting has ended.

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DICTATION

We speak three times faster than we type. Dictation is common in legal firms but now you can get good results without specialist equipment.

Windows 10 comes with build in dictation capacity but it may not be sufficiently sophisticated to cope with legal terminology.

Specialist legal speech recognition software has improved dramatically. If you tried products like Dragon a few years ago, give it a try again now. Speech transcription (which transforms spoken words straight to text on the screen) gives enormous productivity gains.

Try using the dictation function of mobile phone to dictate short text messages or emails. You will be impressed by the accuracy.

TRANSCRIPTION

Record even rapid conversations using AI assisted transcription app like Otter.ai to get a real time transcript. It can detect different speakers and has impressive accuracy using a mobile phone or tablet.

A red circular logo with the text "Otter.ai" in white.

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GET FAMILIAR WITH EXISTING TOOLS

DOCUMENT AUTOMATION

There are lots of good no-code products that enable you to develop your own automated template documents. Using drag and drop tools you can build online responsive questionnaires and decision trees which will produce high quality legal documents.

Clever people have come up with great solutions to solve the problems that lawyer face every day. Look out for ALTA (Australian Legal Technology Association) Demo Days which offer a live demonstration of how some of these products work.

Examples of no-code automation document building tools

Josef

Automio

Checkbox

Neota Logic

Template automation

Office 365
Flow

Google Forms

If you want to improve functionality in Word

Doc Assist

Ideal docs

Take some of the pain out of contract review

Contract probe

Prose

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GET FAMILIAR WITH EXISTING TOOLS

FREE TOOLS

Have a look at what you can do with free or low cost tools that are commonly used in business outside the legal industry. Not all of them will be suited to storing confidential or personal information of your clients so you need to think about how to use them.

It is easy to produce useful and high quality work to communicate in a way that is more engaging and easier to understand.

Project management

Trello

Monday

Wrike

Asana

Visual design

Canva

Lumen 5
(turns blogs
into video)

Content Samurai

Use video to communicate

Zoom

Loom (record
your screen)

Free legislation and cases tagged by subject

Barnet Jade

02

START DOCUMENTING PROCESS

START WHERE YOU ARE

When you are constantly being asked to do more for less, it is easy to feel that you can never catch up let alone get ahead. Things need to change but you don't know where to start.

One place to look for guidance is to look at how the manufacturing industry transformed their delivery systems to improve production speed, enhance quality and lower costs at the same time. Law firms have started applying concepts like Lean to

The legal industry can benefit from well established systems of managing change in complex environments. Creating a business process map for how things are done in law firm helps to show where there are bottlenecks and inefficiencies.

Starting to analyse how your law firm delivers legal services identifies opportunities to make improvements which will be effective and have an impact.

Tools to create a business process map

Visio

Lucidchart

Smart Draw

Ask your team what could be changed to help them do their work better. Once you start looking, you will find things that are being done without any reason (or no reason anyone can remember). If you can fix a few unnecessarily manual and time consuming processes you will get better buy in and commitment to change.

What is Lean and how does it work in a law firm?

03

LEARN HOW TO PRESENT DATA VISUALLY

PRACTICE

The way people communicate is now visual. To be an effective communicator you need to get comfortable communicating with images.

A lot of people think they write much better than they draw. They overlook all the years they spend practicing and crafting the skill to write well.

Drawing is much easier than writing. Anyone can develop your skills to present meaningful information visually - but you need to work out some short cuts and patterns that you can use quickly the way you developed a vocabulary of phrases you rely on when writing.

Read "Draw to Win" by Dan Roam which has a visual alphabet you can adopt so that you can quickly get comfortable in front of a whiteboard.

Ways to start presenting visually when you can't draw

Make a chart

Map out a
sequence

Use post its to
group ideas

Use photos and
images

Pivot charts
(Excel)

Canva

infogram

MAKE TIME FOR YOUR HOBBY


Practicing a creative hobby can make you a better lawyer. It helps train our brains to think creatively and find novel solutions to complex problems.

In his book *Originals*, Adam Grant quoted research finding that Nobel-laureate scientists are twice as likely to play a musical instrument as their peers, and seven times as likely to draw or paint.

Successful innovators are able to combine known things in an unusual ways producing a new solution. Having a hobby when you spend time with people outside your profession can help you spot opportunities to innovation.

And you get to spend time doing something you enjoy.

There are lots of tools available to help you bring more creative thinking and design into the workplace.



Stanford
d.school



IDEO

05

FOCUS ON WHAT YOUR CLIENTS VALUE

“At Amazon, we’ve had a lot of inventions that we were very excited about, and customers didn’t care at all. And believe me, those inventions were not disruptive in any way. The only thing that’s disruptive is customer adoption.”

Jeff Bezos, Amazon founder

OTHER RESOURCES

do an online course

Legal project management

read newsletters

Lawhackers

Legal practice intelligence

find your tribe

Centre for legal innovation

ALTA

Building NewLaw

Doing Law Differently

Listen to podcasts



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ABOUT ME

After over 20 years working in litigation in Sydney in BigLaw, Mid tier and a small firm I'm determined to get more lawyers using technology to streamline and continuously improve the delivery of legal services – to benefit lawyers, law firms and their clients.



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