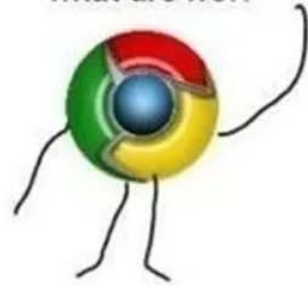


Technology to Work Smarter and Not Harder

LIZZY CARY AND KIM BARRUS
CHARTIER & NYAMFUKUDZA, P.L.C.
LIZZY@CNDEFENDERS.COM
KIM@CNDEFENDERS.COM



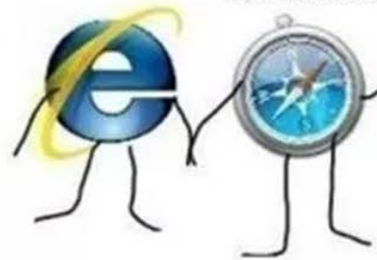
what are we?!



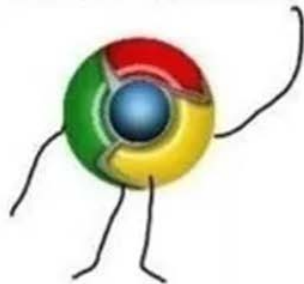
browsers!



browsers



what do we want?!



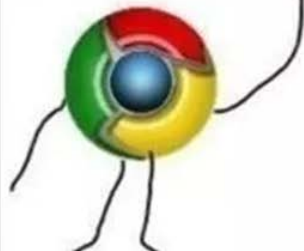
fast internet!



fast internet!



when do we want it?!



browsers!



SLACK



Instant communication
with other members
of the office



Can be used
anywhere



Mobile app



Dedicated channels



Invite collaborators



Stop filling colleague
inboxes with your
lunch orders!

BOX/NETDOCUMENTS

Go paperless!

Access anywhere

Extremely secure

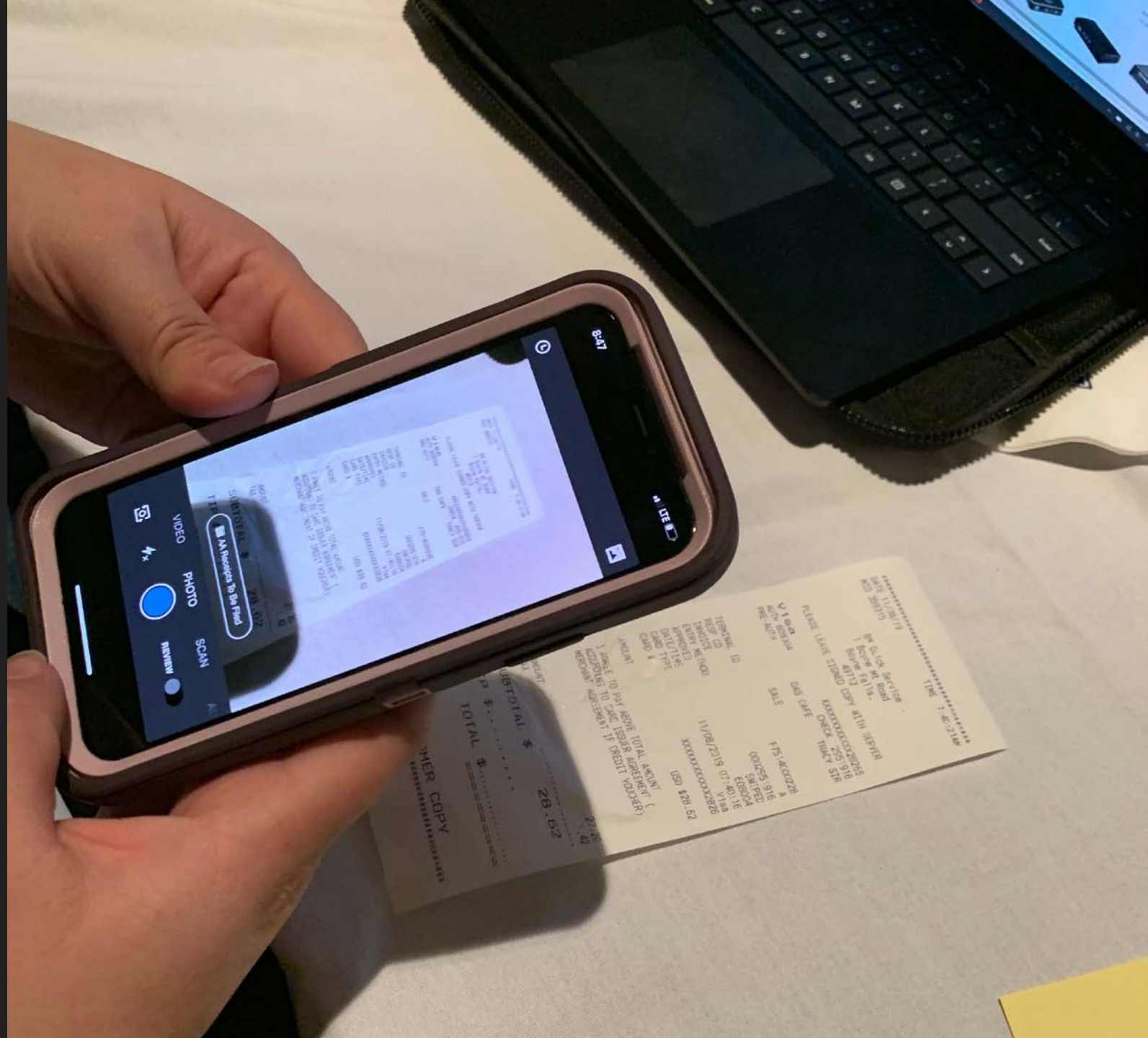
Secure transfer of documents

Allows clients to access what you want – or give them access to upload

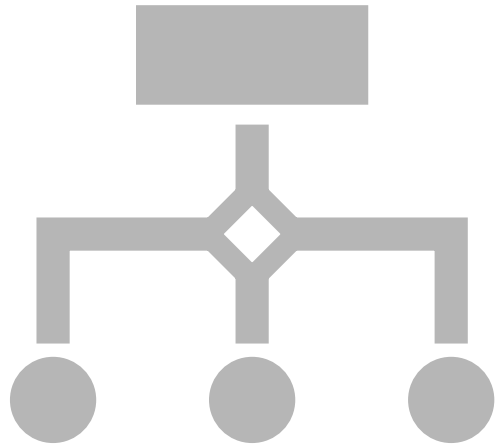
BOX CAPTURE

Easy way to save documents on the go

Easier way to keep track of receipts

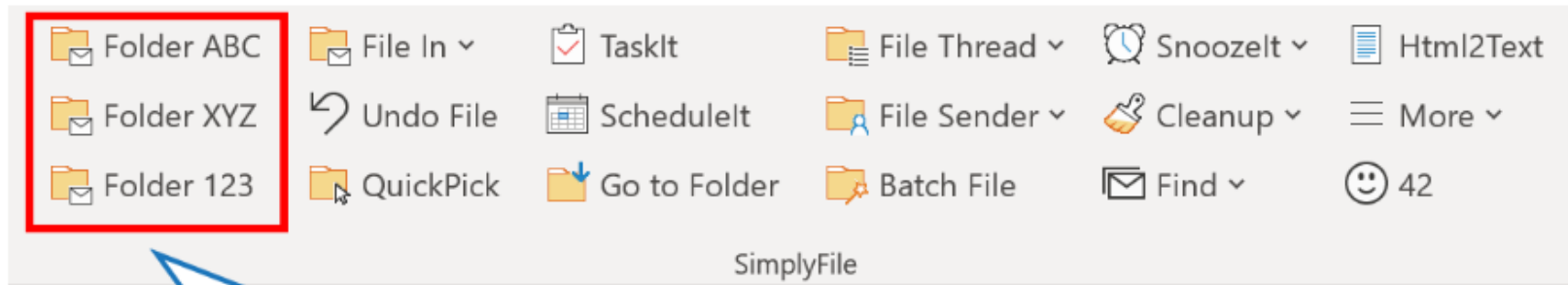


OUTLOOK2WEB



Extension that allows
you to drag and drop
attachments from email
to web applications

Message Filing - SimplyFile on Outlook Ribbon - three one-click-file buttons

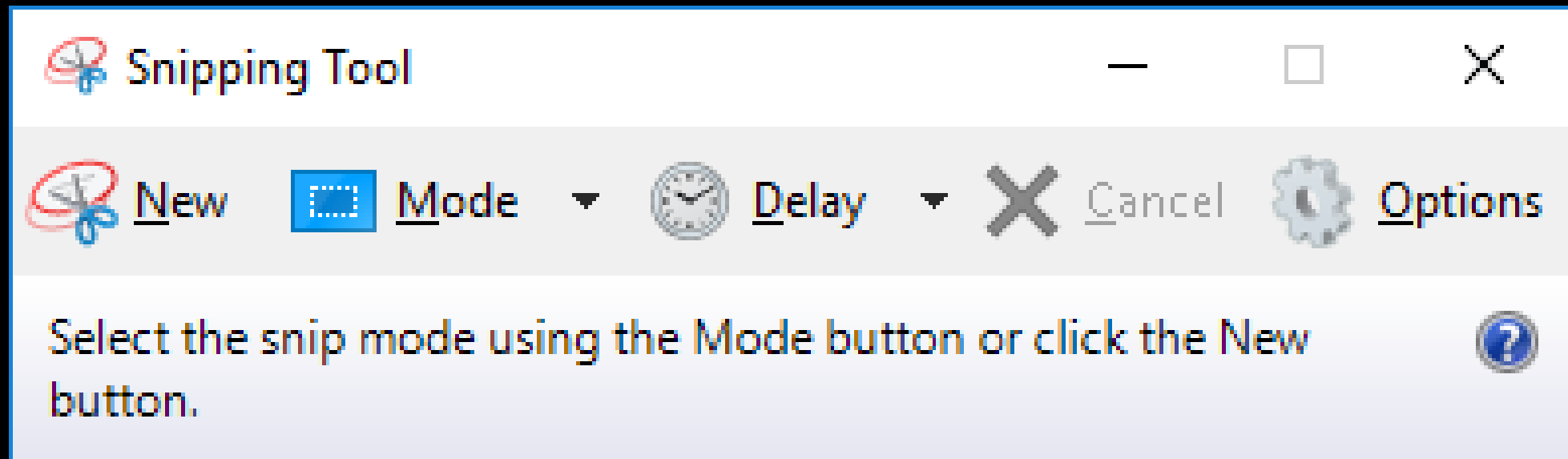


After a brief training period, SimplyFile starts predicting destination folder for every message.

Click the corresponding one-click-file button to file the selected message to the right folder.

One click is all it takes!

SIMPLYFILE



SNIPPING TOOL

Windows snipping tool – “screenshot” specific areas of your screen and save as a photo

Mac version – command+shift+4

INTAKE SOFTWARE – CLIO GROW

Formerly Lexicata

Custom intake forms/questions

Sends link via email to client for them to fill out and submit

Keeps track of referrals/leads

Emails appointment reminders to clients – reminders to fill out intake form

Export client contact information from Clio Grow to Clio Manage

Workflow
management

Client contact
information

Task
assignment

Document
production

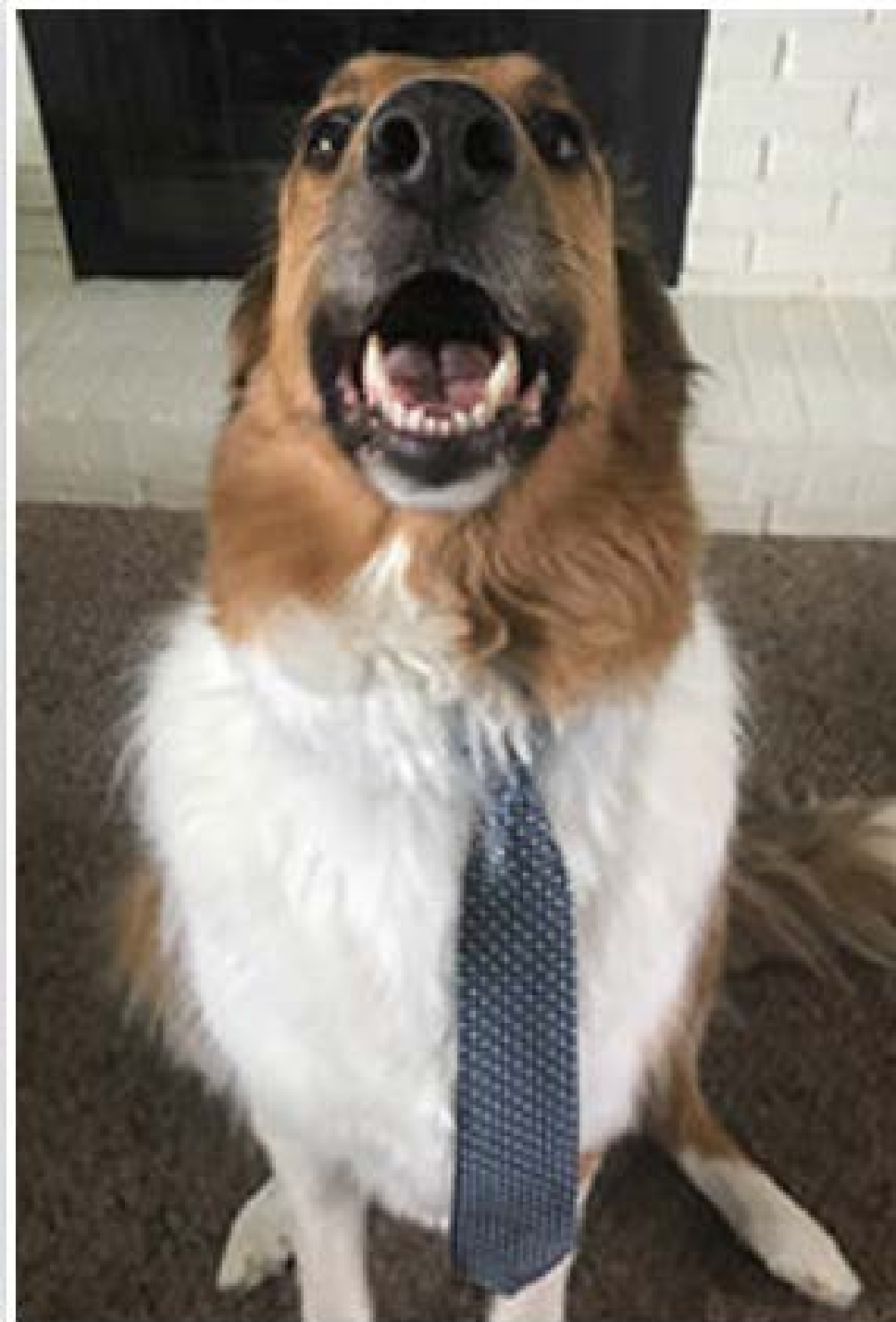
Calendar
and
scheduling

Billing

Reports

Business
overview

PRACTICE MANAGEMENT – CLIO MANAGE



Potential Client:
Miles Cary

Clio Grow – Intake Process

Quick Form

Select form template*

General Intake Form

First name*

Miles

Last name*

Cary

Matter type*

Unassigned

Matter status*


Consult Scheduled


Assign matter to*

x

Lizzy Cary

Choose method

 Fill out form

 Send to client

Email address*

milescary@doggo.com

Email type*

Home

Cancel

Send form

Cary, Miles

Urinating in Public

Share

Edit matter

Dashboard

Activities

Calendar

Communications

Notes

Documents

Tasks

Bills

Clio Connect

Financial

Work in progress

\$0.00

Unbilled \$0.00
Draft \$0.00

Quick bill

Outstanding balance

\$0.00

View bills

Matter trust funds

\$0.00

New request

Time

\$0.00

Add time

Expenses

\$0.00

Add expense

Details

Matter description Urinating in Public

Responsible attorney [Mary Chartier](#)

Originating attorney —

Practice area —

Client reference number 18-234566-DOG

Location PUPPER COURT

Status Open

Open date 08/22/2018

Pending date —

Custom Fields

Prosecutor Jonathan Roth

Judge Laura Baird

Brief Summary of Case Mr. Cary allegedly urinated on a neighbors lawn gnome.

Referred by —

Case Number —

Contacts

Export

MC Miles Cary
Client

Phone —

Email —

Address 123 Doggo Lane
Pupperville, MI 48484
United States (Work)



Related contacts (0)

Add

Timeline

Filters

Jul 22, 2019

[Mary Chartier](#) completed a task '***KL Send Tony intake form'.
12:33 pm

[Mary Chartier](#) completed a task 'Set up initial Box folder'.
12:33 pm

[Mary Chartier](#) completed a task '*** KL Scan any documents'.
12:33 pm

[Mary Chartier](#) completed a task '*** KL Request file from previous attorney, if applicable'.
12:33 pm

Help

[Recents](#)[▶ 00:00:00](#)[+ Create new](#)[Dashboard](#)[Calendar](#)[Tasks](#)[Matters](#)[Contacts](#)[Activities](#)[Bills](#)[Clio Payments](#)[Accounts](#)[Documents](#)[Communications](#)[Reports](#)[Integrations](#)[Settings](#)[Help center](#)[Settings](#) > **Documents****Document Template Merge Fields**[Document Sources](#)[Document Preview](#)

The following fields are available for use in a Document Template. Selecting a matter will preview fields tailored for that matter.

Select A Matter

Merge Field	Value	
<< Matter.Number >>	Skepsis Legal Solutions.00001	
<< Matter.Description >>	Admin	
<< Matter.ClientReferenceNumber >>		
<< Matter.OriginatingAttorney >>		
<< Matter.ResponsibleAttorney >>		
<< Matter.Status >>	Open	
<< Matter.PendingDate >>		
<< Matter.OpenDate >>	02/08/2019	
<< Matter.OpenDate.Verbose >>	February 8, 2019	
<< Matter.OpenDate.Year >>	2019	

<< Firm.Address >>

<< Date.Verbose >>

<< Matter.Client.Name >>

<< Matter.Client.Address >>

RE: << Matter.Number >>,

At: << Matter.Client.Address >>

Dear << Matter.Client.FirstName >>,

As of << Matter.OpenDate >>, I have agreed to represent you in connection with matter << Matter.Number >>.

To confirm, you have been referred to us by, << Matter.CustomField.ReferralSource >>

At this time, I want to thank you for selecting my law firm to represent you in this matter. I also wish to set forth our agreement as to payment of my fees. My fees for legal services are << User.Rate >>/ hour, plus any expenses that may be incurred, such as filing fees, deposition charges, copying costs, postage, and related expenses. My office will bill you approximately monthly depending upon the amount of work that was done on your file during that period of time.

As we discussed, I estimate the fee will be approximately \$10,000 in total. I will also advise you before undertaking any procedures that will substantially increase the amount of fees. Please remember this is an estimate and may be subject to change.

You have deposited << Matter.TrustBalance >> with my firm for fees and costs. My firm will hold your funds in my Lawyers' Trust Account. I will provide you with a monthly statement of fees, costs, and expenses.

Your Matter billing summary thus far:

<< Matter.Billing.Description >>

<< Matter.Billing.OpenInvoiceNumber >>

On behalf of the firm, we are happy to represent you in this matter. If you have any questions, please contact me at your convenience.

Very truly yours,

<< Matter.ResponsibleAttorney.Name >>

<< Matter.Client.Name >>

Booth Law

30 Rockefeller Plaza

New York, NY

January 10, 2018

Kevin Smith

5500 Beta Ave.

Burnaby, BC

RE: 00009-Smith: Divorce,

Dear Kevin Smith,

As of January 10, 2018, I have agreed to represent you in connection with matter 00009-Smith.

At this time, I want to thank you for selecting my law firm to represent you in this matter. I also wish to set forth our agreement as to payment of my fees. My fees for legal services are \$250.00 / hour, plus any expenses that may be incurred, such as filing fees, deposition charges, copying costs, postage, and related expenses. My

Add Task



Task Name

required

Due at ☒ Due in ☐

Tell Lizzy how awesome and smart she is



11/08/2019

Description

Make sure to do this as soon as possible

Assignee

required

Priority

Firm User ▼

Kim Barrus ▼



High ▼

Matter

Type a matter number...



☒ Notify me when this task is completed

☐ Notify assignee via email

[+ Add A Reminder](#)

Save Task

Save & Add Another

or [Cancel](#)

LASTPASS



Only remember ONE master password



Keeps all of your passwords secure and in one place



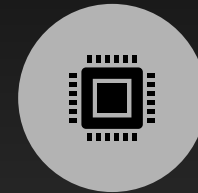
Extension in your GOOGLE CHROME



Fills in your password for you after logging in



Generates strong passwords



Will change the password for you with compatible websites

SCANSNAP



Small enough that it
can sit comfortably
on a desk



Can save it directly
to an email or Box



Portable if needed

TRIALPAD

App on iPad

\$129 – one-time fee







Extremely user friendly

Just like an app on your phone


Callout, highlight, can play audio/video while showing transcript



CASEMAP



People v George Clooney - LexisNexis CaseMap

SmartAssist 




FILE

HOME


REPORTS

CASE TOOLS


VIEW




Clipboard




New Fact




New Record




Delete




More



Issue Linking




Review Linked Files




Research

B *I* U **A**


Text Formatting




Symbol




Sort & Filter




Find



Spreadsheet




Fact Cards



Dashboard

Data Display

>  FACTS - Favorite < Share View

Navigation Pane

Date & Time	Fact Text	Source(s)	Material	Status	Linked Issues
Thu 01/18/2018 9:00 a.m. ET	Woo Mary!				
Wed 02/14/2018 6:00 p.m. ET	Get roses for Mary!				
Fri 02/16/2018 6:15 p.m. ET	Introduce Lizzy to Brad Pitt				
Sat 02/24/2018 3:45 p.m. ET	Break-up fight between Lizzy and Kim over Brad Pitt				
Thu 11/08/2018	Get PPO against Mary!				

People v George Clooney

Fact Chronology

Authored by:

**Mary Chartier
C&N**

Friday, November 8, 2019

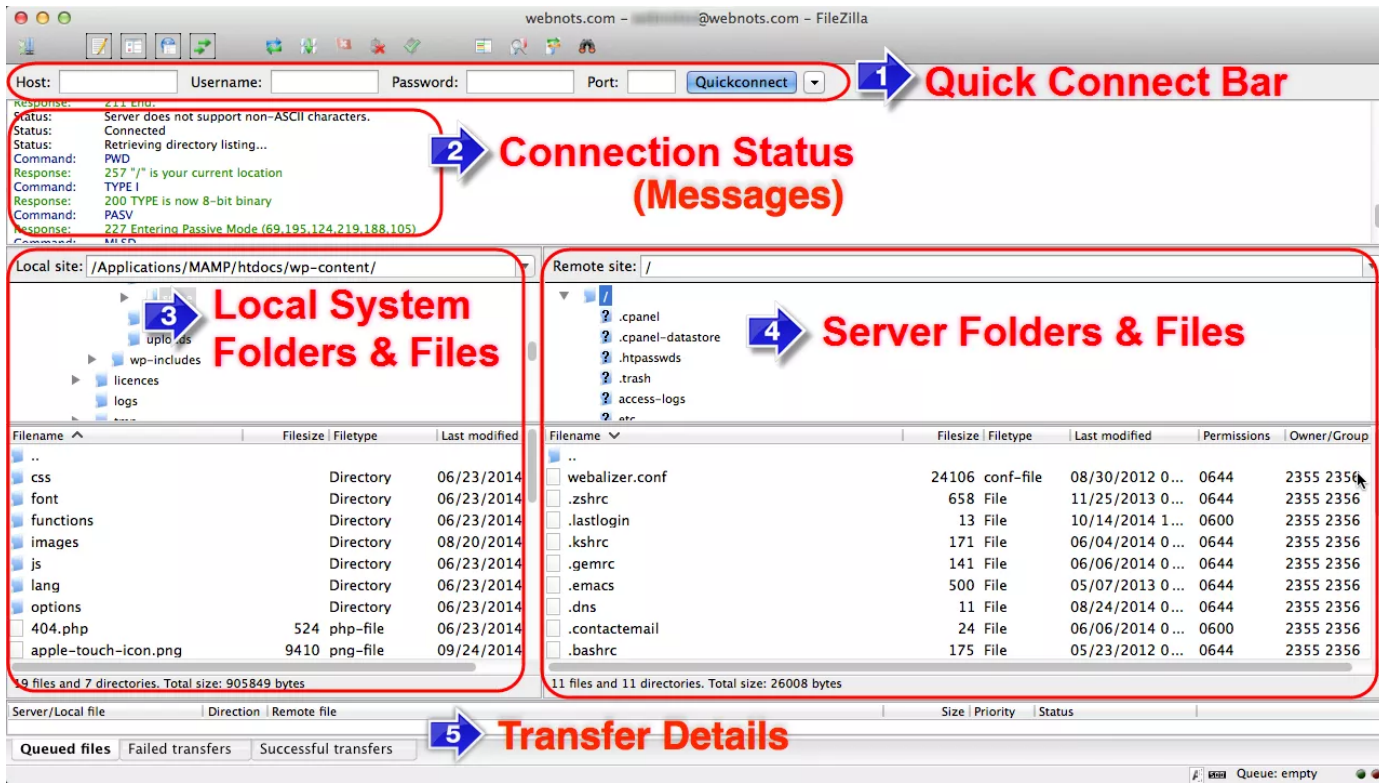
Fact Chronology

11/8/2019 8:46 AM

Date & Time	Fact Text	Source(s)	Material +	Status +	Linked Issues
Thu 01/18/2018 9:04 a.m. ET	Woo Mary!				
Wed 02/14/2018 6:00 p.m. ET	Get roses for Mary!				
Fri 02/16/2018 6:15 p.m. ET	Introduce Lizzy to Brad Pitt				
Sat 02/24/2018 3:45 p.m. ET	Break-up fight between Lizzy and Kim over Brad Pitt				
Thu 11/08/2018	Get PPO against Mary!				

FileZilla

Quicker uploads –
especially those huge
folders of discovery
from prosecutors!





Alexa/Google Assistant

Connects to calendar – reads off your schedule for the day

Reminders

Set timers

Listen to podcasts while you work – perhaps Constitutional Defenders? Now available on iTunes, Spotify, Google Play, and more!



Lizzy Cary

Lizzy@cndefenders.com

Kim Barrus

Kim@cndefenders.com