Shred Your Lawyer's Desk! Running a Paperless Office with Paper Lawyers Rick Jeffries

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- Cline Williams Omaha Commercial Litigation □ Financial Services Securities Banking Insurance/Reinsurance □ Technology
 - □ Intellectual Property
 - □Appeals

My Objectives Today

- Tell my story
- Share what I've learned
 - □ Not to convince you there's only one way
- Show you that it works
- Argue that it can work for paperdependent lawyers and make your life easier.

My office: A typical day



What you think; what I am

- An ordered mind
- Neat freak
- Extremely organized
- Anti-paper extremist
- Totally selfsufficient
- Inflexible

Borderline ADD

Slob

- Easily bored
- Not to be trusted with paper that matters
- Need excellent assistant
- Open-minded

You are in the

information business.

- Where's the complaint?
- When's my hearing?
- I need a trial notebook.
- Remember that letter from the guy about the thing in that one case?
- Would you call the other side and ask for another copy of their interrogatories?
- YOU SHOULD CONTROL THE INFORMATION!

Why lawyers should never touch paper

- We lose it
- We write on it
- We spill coffee on it
- We damage it
- We put it in big messy stacks
- We don't let you know we have it
- We throw it away for no reason
- We make you look for it

Your New Manifesto

"My lawyer will never again touch any piece of paper that matters."

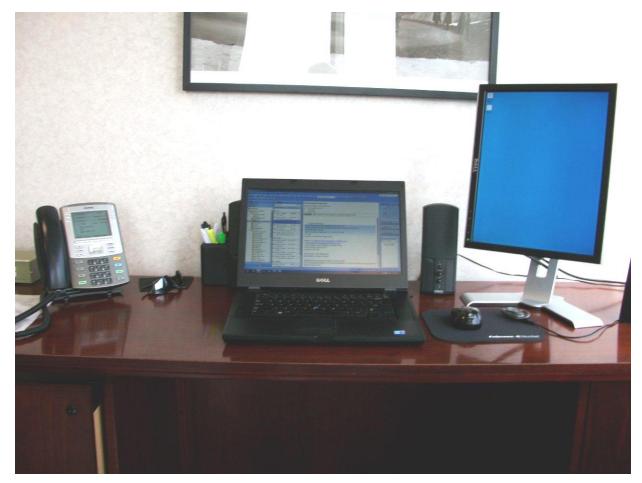
What matters?

-Any document that would make a difference if it were lost.

Why paper files are dumb

- Not searchable
- Not backed up
- Most data doesn't arrive that way <u>anymore</u>
- You <u>hate</u> them.
- Kills trees; puppies are sad
- Messy
- Bulky

My workspace



Critical software

Fast network scanner Sends multi-page documents to your computer at your desk

Adobe 9

Not just the free Reader
Make bookmarked PDF's/bundles

□ Fast OCR capability

The Central Principle of My Paperless Existence

"Don't Take It, Don't Make It."

Don't Take It

Paper that matters doesn't enter my office in my hands, unless it's leaving the same way

□ Pre-processing incoming paper is critical

Don't take it: Processing paper *before* it enters my office

- Usually five minutes with my assistant and the morning mail.
- Instant decision about what each item will need:
 - 🗆 Defer
 - □ Delegate
 - 🗆 Do
 - 🗆 Discard
- Scan what's staying, toss what's not.
- File electronically.

Don't Make It

- Don't make paper for others or me.
- No handwritten notes
- No legal pads
- No Post-its
- No memos to colleagues
- No faxes
- Printouts of drafts only for the dinosaur
- Assistant responsible for live originals

What about the paper file?

Who cares?

- Documents in our document system backed up continuously off-site
- Incoming paper kept by client/matter only
 - No subfiles
 - No books or cards
 - Chron order
- Pleadings kept in Adobe bookmarked file or file group
- File continuously up to date on network
 - □ Assistant isn't consumed with drudge work

But...

- I can't read unless it's on paper!
 - □ My experience: 97% wrong.
 - Rotating second monitor allows reading at bigger-than-life size, excellent ergonomics
- So print *a copy*!

But...

What if a dinosaur wants the physical file?

 \Box So what?

What they really want is to be caught up on key pleadings and correspondence
Easily printed from doc system
No fear of loss, damage, confusion

You can be paperless even if your lawyer doesn't want to be

- Give them copies!
- Image everything you control the filing!
- Reproduce what they want on demand
- Never let them have originals
- Shred their entire desks just for fun
- Don't let good legal work depend on lawyers keeping track of paper.

The Story of Jim and Becky

- Jim Bausch
 - 🗆 Obi-Wan Kenobi
 - Prefers order
 - Makes fun of computers
 - Believes there's a paper file
 - □ Printer in his office
 - □ 60 miles from Becky

- Becky Keep
 - 🗆 Ninja
 - Creates Order
 - Proficient with technology
 - Lets Jim believe there's a paper file
 - Prints what Jim needs

But...

What about a big box of documents from the client?

 \Box So what?

- Up to a box, we can handle it inside
- Beyond a box, use a service
 - Price makes sense
 - \Box Scan, OCR, search
 - Cost savings to client are always substantial
 - Client is impressed

Advantages of my life

- No dependence on physical file
 I hate pleadings and corr books
 Very low signal to noise ratio
- Briefcase always weighs the same
- Searchability

□ Adobe, OneNote have OCR/search capability

- Office is a serene workplace and an instant conference room
- Clients are impressed

Where I fail

Physical inbox

🗆 But

- It's very small
- I process it to done if it gets full
- Boxes of stuff
 - I chicken out on my system

Laziness

- \Box It's only one thing
- Process to done at end of day

The same process can give you complete victory over e-mail

- Keeping your e-mail at zero
 Do
 - Delegate
 - Defer
 - Discard
- File everything
- Process don't "check"
- Read my fabulous article

The parting message

The process is important.

- I think some form of "don't take it, don't make it" is crucial.
- But they're only rules. You must design a process you can live with.
- The process is not inflexible, and neither should you be.
 - □ Paper has hit its limits.
 - □ Technology gets better every day.
 - □Be willing to learn!



For an electronic copy of this presentation:

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