



Shred Your Lawyer's Desk!
Running a Paperless Office with
Paper Lawyers
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ESTABLISHED 1857

Rick Jeffries

- 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 paper-dependent lawyers and make your life easier.

My office: A typical day



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What you think; what I am

- An ordered mind
- Neat freak
- Extremely organized
- Anti-paper extremist
- Totally self-sufficient
- 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 anymore
- You hate them.
- Kills trees; puppies are sad
- Messy
- Bulky

My workspace



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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?
 - 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?
 - So what?
 - Up to a box, we can handle it inside
 - Beyond a box, use a service
 - Price makes sense
 - 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
 - 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!

Q & A

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