

**BUILDING A
21ST-CENTURY
LAW FIRM**

IT'S ABOUT TIME

**ASK DALIAH: WAYS TO RECORD, BILL
AND SAVE THOSE MINUTES AT WORK**



**BY DALIAH
SAPER**

Attorney Daliah Saper has been answering readers' questions online about building a 21st-century law firm. This augmented version of her column looks at time—timekeeping and time-saving.

Dear Daliah: Any tips for tracking time better?

Dear Readers: We have all faced the black-hole time warp. You worked 10 hours, but your billable hours only record 4½. Where did all the time go? You were so busy that you had a granola bar for lunch at 4 p.m. just to soak up all the coffee from the morning client marathon.

Keeping track of all your time often fails because you're distracted by the hundred different things coming at you or because you can't re-create your day at the end when you finally have time to breathe.

Here are three ways to capture your time effectively.

THE AUTOMATIC WAY

Stay ahead of the game, and use practice management software that integrates your billing and has customizable workflows all in one. Not being able to consistently reconstruct time can bankrupt a practice.

I asked my friend Alvaro Arauz at 3a Law Management, a legal practice consulting firm in Atlanta, for some technology recommendations. He says cloud-based software you can access from anywhere with an internet connection, such as Clio, MyCase or Rocket Matter, is used by many firms. These platforms can automate standard billable tasks, such as basic discovery, emails, text messages to clients, court hearing confirmations or cover letters.

The 0.2 and 0.1 hours can add up in a day but can be easily lost. With the proper services, predefined tasks convert into time slips with a click of a mouse without having to remember if everything was billed in the scope of the assignment. Keep in mind, the time slips can always be adjusted in the prebill phase.

The two things any firm of any size can streamline, Arauz says, are phones and accounting. Not managing either effectively also can make or break your practice.

Part of the accounting headache is the chore of reminding and following up with clients about payments. Then there's the actual collection of payments; in some firms, it's a bookkeeper's part-time job.

New options are available to the modern lawyer, and PaySimple is exactly what it says—a simple software program that lets you schedule payments and accept e-checks and credit cards while it automates your billing process. Even the established merchant services LawPay and QuickBooks allow you to send a link to clients via email for them to pay their invoices or retainers.

Arauz says to take it all a step further by using practice management software that syncs with LawPay and QuickBooks. If the structure of your website allows it, which most do these days, there also are payment portals that can be added for either potential clients scheduling a consult online or existing clients who received an automatic emailed invoice.

The second thing to delegate are the phones. There are a variety of live answering services that range from \$99 to \$800 per month—services such as Ruby Receptionists, My Receptionist and PATLive. They give your clients the

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impression that your practice has a front desk ambassador. Just remember the old adage that you get what you pay for, and try to stay in the \$200 to \$500 range.

Ruby Receptionists is a quality and tested company. Script how you want your phones answered—when they get transferred immediately, i.e., when a judge calls; when to email your staff—and monitor it all with monthly reporting logs.

If you have a high-volume practice or a large number of weekly potential intakes (personal injury, bankruptcy, med-mal), Legal Intake Professionals will handle your entire intake process. Equally customizable on how to prioritize calls, it adds the extra level of capturing details that most answering services do not provide.

Once the intakes come in, a paralegal or an attorney contacts the potential client to engage them formally. However, the monthly price

is slightly higher than most services but still less than the salary and payroll liabilities of an intake specialist plus a receptionist.

For the ultra-high-volume intake firms, there are plug-ins for your website or case management software that will email intake forms to potential clients and then enter them into your internal system automatically. Capturing the case information and data entry is the bottleneck of the intake process. Delegate it to the potential client and technology, Arauz says, all from an iPad on a couch in your waiting room.

THE REACTIVE WAY

If work and life keep you busy, use mobile apps to make sure nothing falls through the cracks.

Before technology, lawyers had their hands tied behind their backs. Dialing into a server or a desktop on the weekends to enter time made it

an insurmountable task. In a week slammed with juggling phone calls from clients, court appearances, interruptive status requests from partners, researching case law, drafting discovery and filing motions, even the most efficient billing workflow was at best a four-step process:

1. At the end of the day or, worse, at the end of the week, try to recall what happened.
2. Write the time down on a Post-it/notepad/back of your hand.
3. Manually enter data into a billing system.
4. Approve the slips for accuracy and consistency.

Today, Arauz recommends using apps such as Zapier, Dragon NaturallySpeaking or Siri to help convert your reactive life into a proactive billing system.

Zapier integrates with things that keep your thoughts and work

Three ways



TECHNOLOGY



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1

Firm Builder Customization

Select only the tech and services that match your needs.

2

Free Consultation

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in order—Dropbox, Wunderlist, QuickBooks, RingCentral, Excel, Clio, Basecamp. Zapier can automate your lawyer life, track the work you perform, and keep it all together in one app that communicates with all the others to make sure nothing gets lost.

Similarly, you can use Dragon NaturallySpeaking or Siri to dictate your time entries when you don't have time to write it all down. The technology and accuracy of capturing what you are saying has improved dramatically over the years, as has the convenience of being able to email or send your dictation via text. I often dictate on long road trips or when I'm walking to the courthouse.

Don't forget the apps that complement your desktop or cloud practice management software. Most of them can dial phone numbers or email directly from the app, which in turn captures the time as billable behind the scenes.

THE PROACTIVE WAY

Interruptions distract from efficiency and, ultimately, from capturing all your time. Build blocks of time into your schedule, so that you aren't pulled in five directions at once and only accounting for 2½ of them.

If "shiny objects," such as flashing voicemails, text pings or unread email counts are disruptive, create a calendar for concentration. Try a schedule as follows and adjust as necessary:

- Priority emails, 8 to 8:30 a.m.
- Priority phone calls, 8:30 to 9 a.m.
- Client work, 9 to 11 a.m.
- Emails and calls, 11 a.m. to noon.
- Priority items, 1 to 2 p.m.
- Client work, 2 to 3:30 p.m.
- Email responses, 3:30 to 4:30 p.m.
- Calls on the way home, 4:30 to 5:30 p.m.

While it won't eliminate all the

distractions, keeping close to this regimen can help you maximize your productivity and the chances of capturing all the time as you go.

PRODUCTIVITY TALK

Speaking of productivity, Arauz has advice on tackling other nonlawyering tasks.

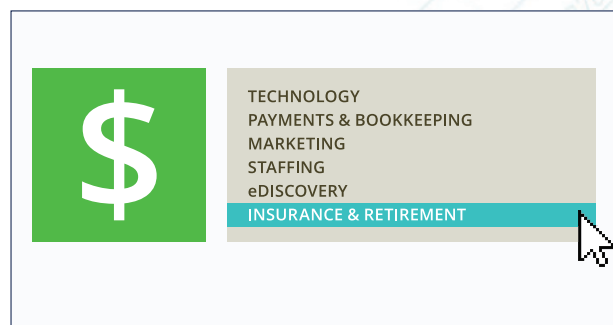
He says, "There is a finite amount of time and energy in a day that cannot be re-created. If you overcompensate in one area, then another area suffers. So how do you juggle it all while maintaining sanity? The key to growth is delegation, either to a person or to technology.

"When you start your practice, delegate to technology. As you grow and can swallow the payroll pill, integrate staff and attorneys until law firm nirvana happens when your employees utilize technology to get even more done faster."

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include scheduling and confirming appointments, Arauz says. When things really get busy, every moment counts. Waiting on a consultation to not show up or a lunch meeting that you forgot to mark on the calendar takes up valuable time that could be better spent.

Setmore is free, online appointment-scheduling software on steroids, especially if you upgrade to the \$25-per-month premium package. Aside from potential clients or clients booking meeting times intuitively by web, Setmore can be configured to send text and/or email reminders the day before the appointment, which minimizes the no-call no-shows that can inevitably happen in any practice. And it's very customizable.

(You can retain that possessive control of your calendar, so that your

work and life don't double-book.)

Mixmax is another quick trick that takes all the effort and emails out of trying to find a time to collaborate with others, be it by phone, video or in person. If you average 300 emails per day that require your attention, you certainly don't have to add another 30 emailed dialogues of "Can you meet at 2 p.m.?" "No, I can't. What about tomorrow at 10 a.m.?" And on. And on.

Send time slots that the emailed recipient can select once they have confirmed with their own calendar, and then it gets added to your calendar.

Add meeting agendas or previews to the scheduling team, use templates for scheduling automatic emails and branding, so that it looks like it's coming right from your firm's inbox.

It's good to use the technology at the beginning. But keep it integrated in your processes as you grow with staff, so that they have the tools to help the firm succeed.

Remember, as I like to keep in mind: Time is money. So start accounting for it all. ■

Daliah Saper opened Saper Law Offices, an intellectual property, digital media, entertainment and business law firm in Chicago, in 2005. Saper is regularly interviewed for national TV, radio and publications, including Fox News, CNN, CNBC, ABC News, 20/20, the New York Times and the Chicago Tribune. She is an adjunct professor of entertainment law at Loyola University Chicago School of Law and can be reached at AskDaliah@ABAJournal.com.

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