

# CONTENTS

Dedication .....	xiii
Acknowledgments .....	xv
About the Author .....	xvii

## CHAPTER 1

Freeing the Lawyer from the Paper Anchor .....	1
How the Book Is Laid Out .....	5

## CHAPTER 2

<b>The State of Paperlessness Makes the Lawyer's Time More</b>	
Valuable .....	7
Digital practice puts the lawyer in "the zone" .....	8
In a paperless practice, the lawyer can find the zone more easily and for longer periods .....	9
Remove clutter on desk and other distractions .....	11
Reduce external distractions, including phone calls, e-mails, and staff or others interrupting .....	14
Reduce internally created distractions .....	15
Without paper, the lawyer can schedule his practice to make the most of his productive hours .....	16
Working in the State of Paperlessness takes less time .....	17
Time lost commuting to and from the office— transportation time .....	18
Time lost because other circumstances (work, family, travel) separate the lawyer from the office— dislocation time .....	19
Time lost because the day is fragmented into different tasks and responsibilities that result in inefficient movement from place to place—fragmentation time ....	20
Time lost in scheduling and attending meetings with others to collaborate or communicate within a matter— collaboration time .....	20
The paperless practice makes the attorney more competent ....	21
The anvil on the folder is lighter when it is paperless .....	21

*CHAPTER 3*

**The First Step to Being Paperless Is Replacing Paper with Portable**

Document Format (PDF) .....	25
PDF software replaces paper .....	25
Converting PDFs into usable text .....	26
Text conversion .....	27
Tables and columns .....	27
Use of PDF in contracts .....	28
Tools in the PDF programs bring added power to the lawyer in the State of Paperlessness .....	28
Snapshot .....	29
Building documents by addition, deletion, and extraction .....	29
Use in a motion or other pleading .....	29
Selectively cataloging multiple documents .....	30
Securing documents .....	31
Signing documents securely .....	31
Using the form provisions .....	31
Reading the documents out loud .....	32
Measuring and drawing on documents .....	33
Typewriter .....	33
Bates stamping .....	33
Redaction .....	34

*CHAPTER 4*

**Programs You Already Use Have the Power to Make Your Practice**

Paperless .....	37
Word-processing skills .....	39
Keyboard practice and use enhance productivity in the paperless office .....	39
Dictation .....	40
Handwriting .....	41
Mastering the commands in word processing .....	41
Tracking and comparing changes to documents .....	41
Comments and balloons .....	42
Spell check, grammar check, thesaurus .....	42
Styles in Word .....	42
Fundamentals of font selection, size, color, etc .....	44
Headings and automatic paragraph numbering .....	44
Page numbering .....	45
Cross-referencing .....	46

Merging and mailing.....	46
Footnotes and endnotes .....	47
Citation, tables of authorities, and bibliography .....	47
Indexing the document .....	48
Concordance .....	48
Online or in the cloud forms programs .....	49

*CHAPTER 5*

**Hiding the Invisible Digits from Prying Eyes and Purloining**

<b>Fingers: Confidentiality and Security in the State of Paperlessness .....</b>	<b>51</b>
Control the coming and going of confidential information .....	51
The security basics .....	54
Passwords are the best defense .....	57

*CHAPTER 6*

**Organizing, Analyzing, and Distilling Documents and Information**

<b>in the State of Paperlessness .....</b>	<b>59</b>
The lawyer and notebooks .....	62
Building a notebook with spreadsheets.....	63
Building a notebook with PDF portfolio .....	64
Building a notebook with OneNote .....	65
Organizing the elements and thoughts through CaseMap .....	66
Organizing thoughts with Mind Mapping .....	69
Litigation and the Trial Notebook .....	71
Example of using OneNote in the State of Paperlessness: Appeals .....	73

*CHAPTER 7*

**Communicating and Transmitting Documents in the State of**

<b>Paperlessness .....</b>	<b>77</b>
E-mail can do anything paper does when it comes to communication .....	77
The lawyer can rely on e-mailing as she would first-class mail	78
The lawyer needs to take control of her e-mail .....	78
The lawyer should establish e-mail addresses .....	79
Passwords are the lock and key even for e-mail .....	80
Keep the e-mail box clean .....	80
Organizing e-mails .....	81
Take care with e-mail language .....	82
The lawyer shall carefully choose words when using e-mail ...	82

The lawyer needs to practice e-mail etiquette .....	83
Things that will help avoid e-mail gaffes .....	84
Rules a lawyer must follow when using e-mail .....	85
Anything posted in an e-mail never dies .....	85
Don't say anything in an e-mail you could not say in person .....	85
Think twice before hitting Send—maybe three times .....	86
Saving in draft folders is really sending .....	87
Always check the “To field” before sending .....	87
Think twice about hitting “Reply All” .....	87
Read the whole e-mail, including all of the parts of the previous messages in the string, before responding .....	87
Know the difference between reply and forward .....	87
Text messages and instant messages should be used sparingly .....	87
Do not convey by e-mail anything that is dishonest, pornographic, or insulting to anyone .....	88
Do not broadcast .....	88
Remember that sometimes the e-mail contains too much information .....	88
Do not spam .....	88
Mailing to the masses, social networking and communicating in the State of Paperlessness .....	88
LinkedIn, the professional network .....	89
Websites .....	91
Using the website to convey information .....	91
Websites that receive information .....	92
Use online vaults .....	92
Blogs .....	92

*CHAPTER 8*

**Reading, Writing, Executing, and Presenting Documents**

<b>in the State of Paperlessness</b> .....	95
Writing paperlessly .....	95
Document generators .....	95
Writing without paper .....	101
Reading documents in the state of paperlessness .....	103
Signing documents does not require ink on paper .....	105
Digital signing is legally binding .....	105
Notarizing signatures without paper .....	108
Secure the signed document .....	108

Taking the State of Paperlessness to the court .....	109
Handling a hearing without paper .....	109
Filing paperless documents with the government .....	110
Storing records electronically rather than on paper .....	112
ePublishing provides the lawyer access to “printed” material without the paper .....	113
And there still is paper .....	113

*CHAPTER 9*

<b>Storing and Finding Information in an Ocean of Digits .....</b>	<b>117</b>
Structure of data storage .....	118
Determining the model by which the documents are organized .....	118
Naming files .....	120
Document searching .....	121
Storing other documents .....	121
Keep the files cleaned up .....	122
Get rid of information before getting rid of computers .....	122
Clean up excess copies .....	123

*CHAPTER 10*

<b>Where Should the Digits Reside—On Terra Firma or in the Firmament? .....</b>	<b>125</b>
Documents and software in the cloud .....	129

*CHAPTER 11*

<b>Managing Information Disruption in the State of Paperlessness .....</b>	<b>133</b>
Identify the risks .....	134
Don't ignore the old-fashioned and physical threats .....	136
There is no backup unless it is done in three different places .....	138
The system must provide for redundancy in software and approaches to backup and retrieval .....	140
Recognize that data may not be on the system that is subject to routine backups .....	140
During times of generating documents with a time deadline (such as writing a brief), frequent and distinct storage is essential .....	141
Prepare for disaster .....	143
Practice, practice, practice .....	143
Put the disaster recovery plan in writing and place it in the hands of key individuals .....	144

*CHAPTER 12***Acquiring and Using Practice Management in the Paperless**

<b>Practice</b> .....	147
The lawyer needs to define the goal of going paperless.....	147
There are different kinds of management systems focused on different aspects of the practice .....	148
Different factors determine the right practice management system .....	149
Incorporate other databases into the main system database .....	152
Practice-specific programs with file management systems .....	153
E-mail should not be a file management system .....	153

*CHAPTER 13***Finding a Place for the Lawyer in the State of Paperlessness** ..... 155

The lawyer actually works where she wants to .....	156
The lawyer needs a worksite office .....	157
Using mobile equipment, the lawyer can make anywhere her worksite office .....	159
A lawyer needs a place to make contact with clients, staff, and others .....	162
The lawyer needs a place to meet with others, a meeting office .....	163
A place that provides support to do the job .....	163
The law office in the State of Paperlessness may or not be a "virtual" office .....	164
In summary, the lawyer should choose a work location that is appropriate to the task, the number of people she works with, and the availability of time- or budget-reducing alternatives .....	165

*CHAPTER 14***Equipping and Furnishing the Lawyer in the State of**

<b>Paperlessness</b> .....	167
The Computer .....	168
Power .....	174
Telephone .....	175
The telephone brings additional paperless tools to the office .....	175

Portable digital assistants, cell phones, and the lawyer	
on the move .....	176
Voicemail .....	177
The lawyer is still obligated to maintain confidences	
when using the phone .....	179
In the State of Paperlessness, furniture is as simple or	
ornate as the lawyer wants or can afford .....	179
The workspace or desk .....	179
The chair holds the most important part of any	
office—the lawyer .....	181
Other furnishings .....	183
Decorate the office to be pleasant .....	183
Lighting is important .....	183
Have a comfortable chair, couch, or loveseat away	
from the desk .....	184
Furnishing the meeting place .....	184

*CHAPTER 15*

<b>Lawyer Here, Lawyer There: Equipping the Roaming Lawyer ....</b>	<b>187</b>
The laptop .....	187
Portable data storage .....	189
Tablets .....	189
Comparing the laptop and tablet .....	191
Securing the mobile office .....	192
Securing the data .....	193
Cell phone passwords .....	193
Security Tips .....	193
Dealing with theft of information .....	195
There is less need for travel; everyone can share the	
same thing at the same time .....	195
Placing documents in the cloud reduces the need to	
have meetings at a specific time .....	197
Traveling in the State of Paperlessness .....	197
Keep the tablet, PDA, and laptop synchronized for	
contacts and calendar .....	197
Have a fully prepared briefcase .....	197
Preparing for the average trip .....	199
The full system .....	199

*CHAPTER 16*

**Acquiring and Developing the Skills for Practicing Law in the State of Paperlessness** ..... 201

    Profiling, not post-filing, information ..... 201

    Steps in handling paper in the paperless office ..... 203

    Making the transition ..... 205

    Moving forward within the State of Paperlessness ..... 208

    Don't look back! ..... 209

    Special documents ..... 210

        Handling faxes ..... 210

        Processing e-mails ..... 210

        Calendar and deadlines ..... 211

        Audio and video recordings ..... 211

        Handling the archived paper from prior practice ..... 212

        Converting web views to digital documents for the future ..... 213

        Outside processing for the extraordinary file ..... 214

    The State of Paperlessness needs to include everyone to get the full benefit ..... 214

*CHAPTER 17*

**Managing Your Entire Law Practice in the State of Paperlessness** ..... 217

    Management of the entire practice ..... 217

    Calendaring the digital office brings greater control over the lawyer's time ..... 219

    Scheduling the workflow ..... 221

    Written calendars as a backup can help avoid missing deadlines ..... 223

    Conflicts ..... 224

    Paperless practice and the billable hour ..... 225

    Employ out-of-office solutions ..... 226

*CHAPTER 18*

**Being Ethical in the State of Paperlessness** ..... 227

    Protecting the confidence ..... 227

    The lawyer should treat his computer as a piece of professional gear, not a toy or entertainment device ..... 230

    The ability to quickly and seamlessly alter documents should not overlook the obligation of candor ..... 232

A technical emergency on the lawyer's end is not necessarily excusable neglect to the court ..... 232

Make sure that the source of copying is correct and relevant ..... 233

Actually, not virtually, know to whom you are talking ..... 234

Know that the recipient of the e-mail is the intended recipient ..... 235

In a digital world, there are no "hidden" or "erased" words or files ..... 235

Documents have histories that can substantiate (or not) what you claim in terms of timing..... 237

Don't operate a paperless office when under the influence of drink or drugs ..... 237

Lawyers are obligated to preserve digital files as they would paper documents ..... 238

*CHAPTER 19*

**Maintaining Sanity in the State of Paperlessness..... 241**

    Why is depression so prevalent among lawyers? ..... 243

    Treatment for depression ..... 245

*CHAPTER 20*

**Growing Professionally in the State of Paperlessness..... 249**

    Being the best in the State of Paperlessness requires constantly looking for new and better ways to work. .... 249

    Constantly look for new tools, new ways to use old tools .... 250

*CHAPTER 21*

**Recognizing When You Have Arrived in the State of Paperlessness ..... 251**

**Index ..... 251**